OCEAN for

Economic Development Programs

(ED)

Application Preparer

User Guide

July 23, 2014

Version 1.0

Ohio | Department of Development

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Document Overview

OCEAN for Economic Development Programs (ED)

Welcome to OCEAN. The purpose of this user guide is to instruct you on how to navigate and use the OCEAN application software.

This guide is designed for Application Preparers for the ED program. This guide will instruct you on how to perform the following functions in OCEAN:

- Logging in to OCEAN
- Changing your password and/or organization
- Completing an application for ED
- Logging out of OCEAN

Technical Requirements

To access the OCEAN application, you will need:

- A high-speed internet connection
  - 4 MB or greater download speed
  - 1 MB or greater upload speed
  - Visit http://www.speedtest.net/ to test your current internet speeds
- Internet Explorer version 7 or greater
  - Disable pop-up blocking software

OCEAN for ED Process Diagram

OCEAN Section	Elements of Section	Description of User Activities
Login → Application Request Search		
1 Community & Program Information	Administrative Agency Administrative Contact Information	• Define Administrative Contact • Initiate an Application
2 Program Description	Program Description Program Narrative	• Add/Edit Program Description • Delete Program Description
3 Economic Development Details	ED RLF Balance Previous Recipient and Past Awards	• Save Economic Development Details
4 Business Information	Company Information Ownership	• Add/Edit Business Information • Delete Business Information
5 Need for Assistance	Need for CDBG Funds	• Save Need for Assistance
6 Impact Analysis	Criteria and Explanation Impact of Project	• Save Impact Analysis
7 Compliance Details	Compliance Details	• Save Compliance Details
8 Job Information	Existing FTEs Retained and Created Jobs	• Save Job Information • Add/Edit Job Information
9 Financing Data	Leveraged Fund Providers Fund Amounts	• Add/Edit Leveraged Funds • Delete Leveraged Funds
10 Project Details	Project Type Project Budget Project Address	• Add/Edit Project Details • Delete Project Details
11 Activity Information	Activity Class & Name Activity Budget Short Activity Description	• Add/Edit Activity Details • Delete Activity Details
12 Activity Leveraging	Activity Leveraged Funds	• Add/Edit Activity Leveraged Funds • Delete Activity Leveraged Funds
13 Grant Request Documents	Required and Non-Required Documentation Add Document Upload	• View Document Templates • Attach Documents • Delete Documents

OCEAN Section	Elements of Section	Description of User Activities
14 Grant Request Checklist	Print All Application Pages Available Application Reports	• View Reports • Save/Print Reports
15 Revision	View Prior Amendment Details	• View Revisions
16 Comments	User Commentary	• Add/Edit Comments • Delete Comments

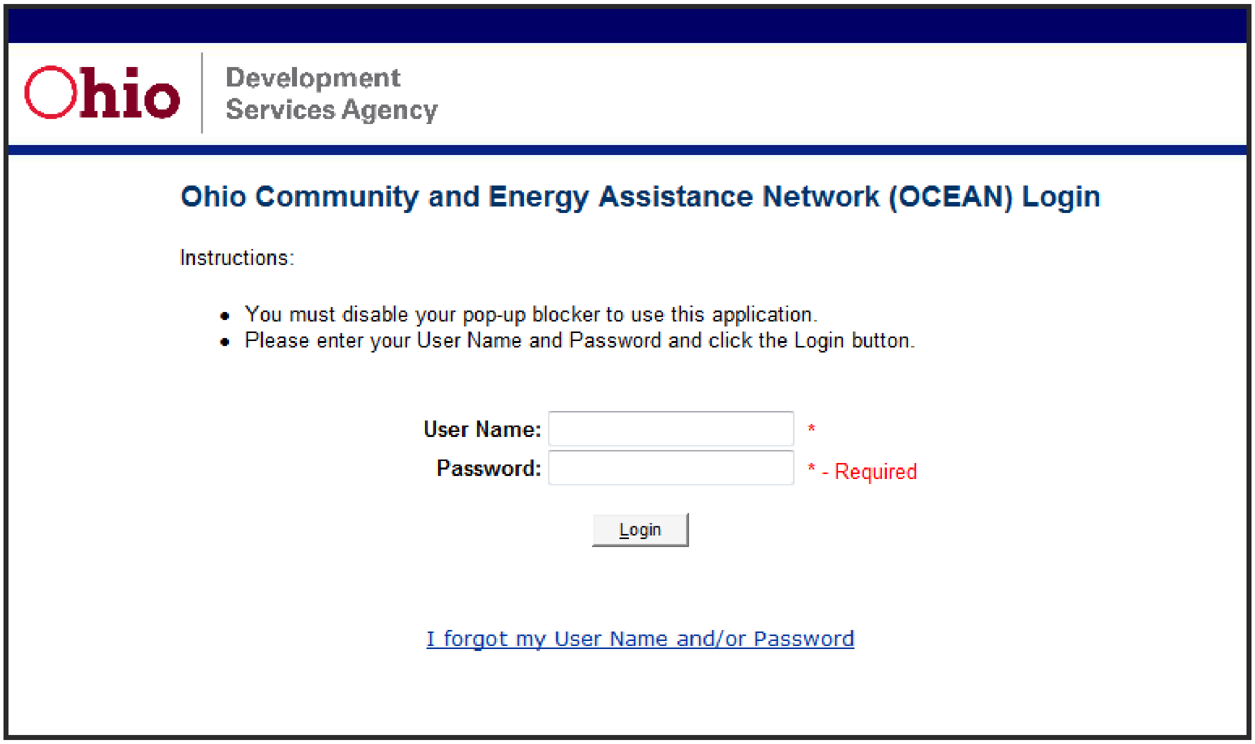
Accessing and Logging into OCEAN

Requirements for access to the OCEAN application:

- Complete the "Going Online with ODSA – OCD Intake Forms" file
    - This document must be signed by your Organization's CEO and a Notary Public
    - Submit your completed form through one of the following three options:
        - Email: scan and email completed and signed forms to Scot.Burbacher@development.ohio.gov
        - Fax: 614-955-1465 attn: Scot Burbacher
        - Mail: Scot Burbacher
77 South High Street
P.O. Box 1001
Columbus, OH 43216-1001
    - Once your forms have been received by OCD, they will be forwarded to the OCEAN Help Desk for processing. For any new User accounts created, the User will receive an email once the account has been created. The email will include a link to the OCEAN website as well as login information.
- User ID and Password

Login Screen

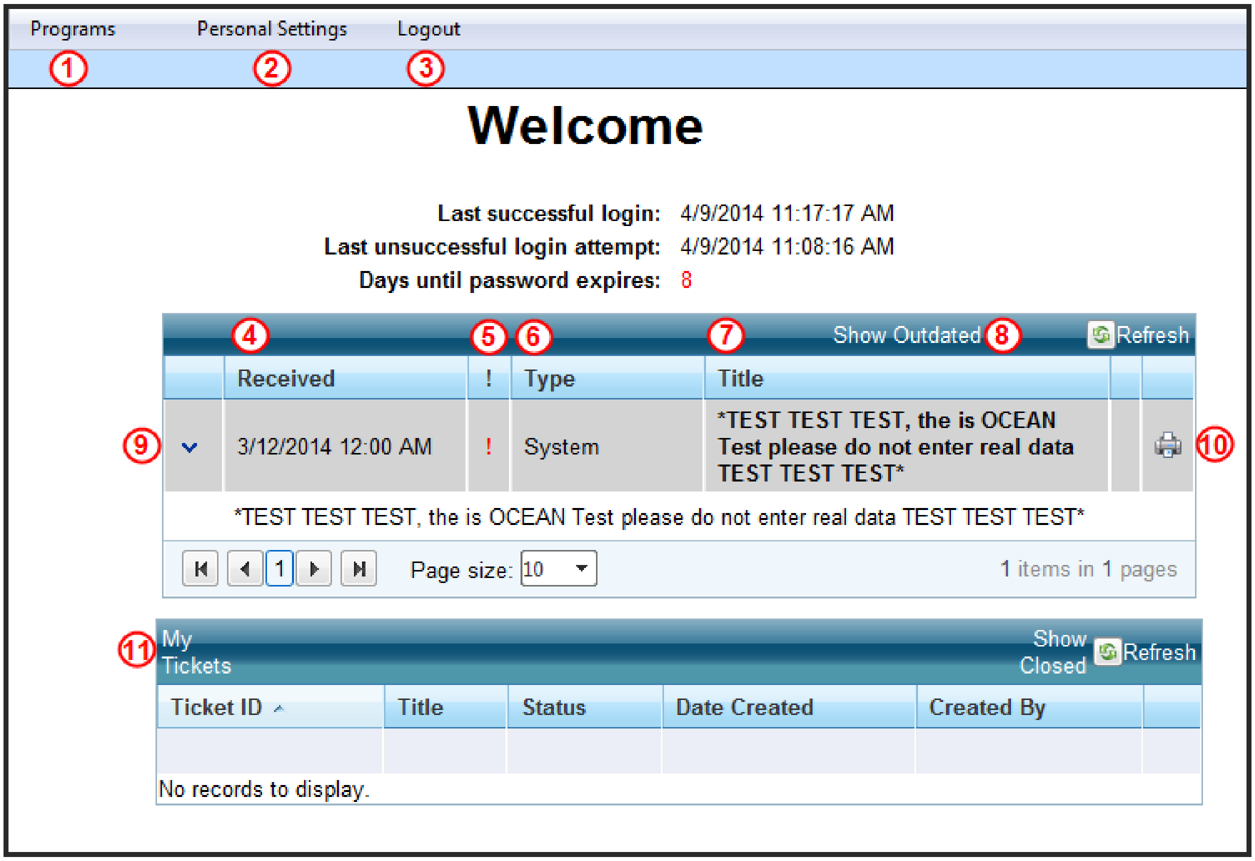
The screen below is the login screen for OCEAN.



Username and Password are required. If you forget your username or password, click on the "I forgot my User Name and/or Password" link to reset it.

OCEAN Navigation and Menu

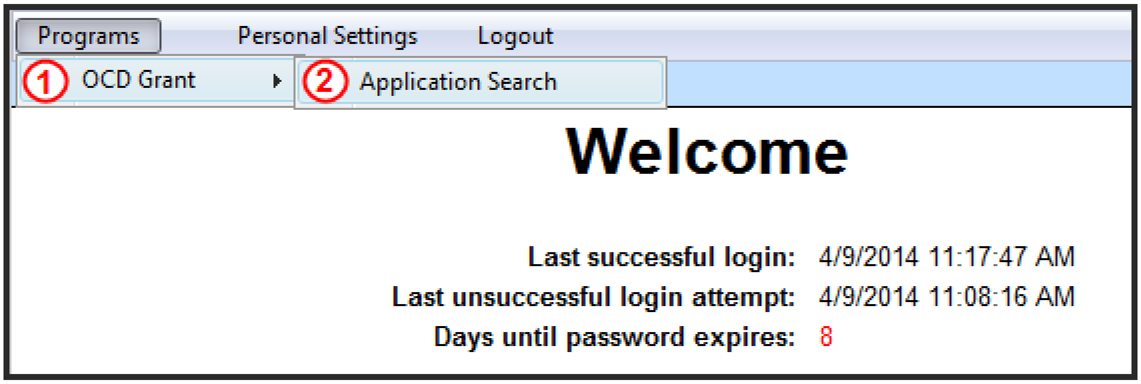
Welcome Screen and Notification Center



This is the OCEAN Welcome Screen. The Welcome Screen has the menu navigation across the top of the page. The Notification Center and My Tickets grids are also displayed.

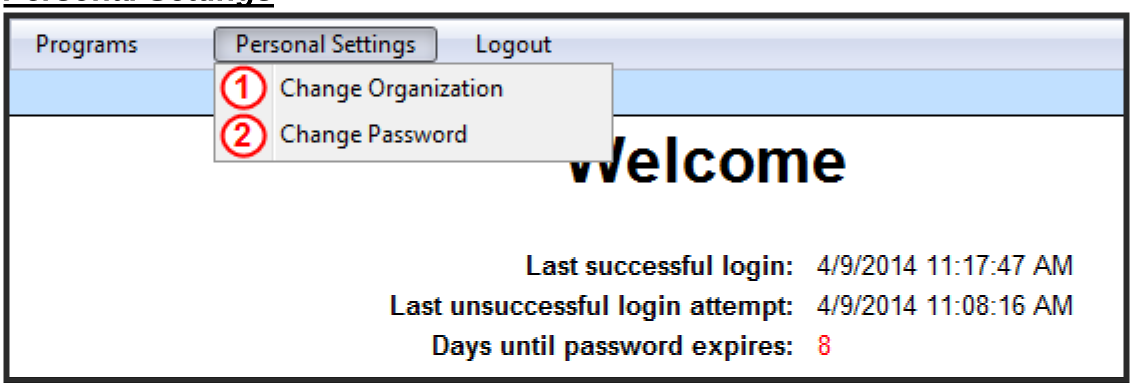
Menu/Field	Purpose
1. Programs	Used to access the OCD grant menu options.
2. Personal Settings	Used to change your password and/or organization.
3. Logout	Used to sign out and exit the OCEAN application.
4. Date/Time Received	Sortable column of notification messages date and time.
5. Urgency Icon	Sortable column identifying the message as urgent.
6. Type	Target audience – either system, organization, or role-based.
7. Title	Short description of the message.
8. Show/Hide Outdated	Click to reveal/hide past or outdates messages.
9. Message Line	Click on arrow to expand and view communications in regards to OCEAN.
10. Print Icon	Click to print the message to your local printer.

Programs



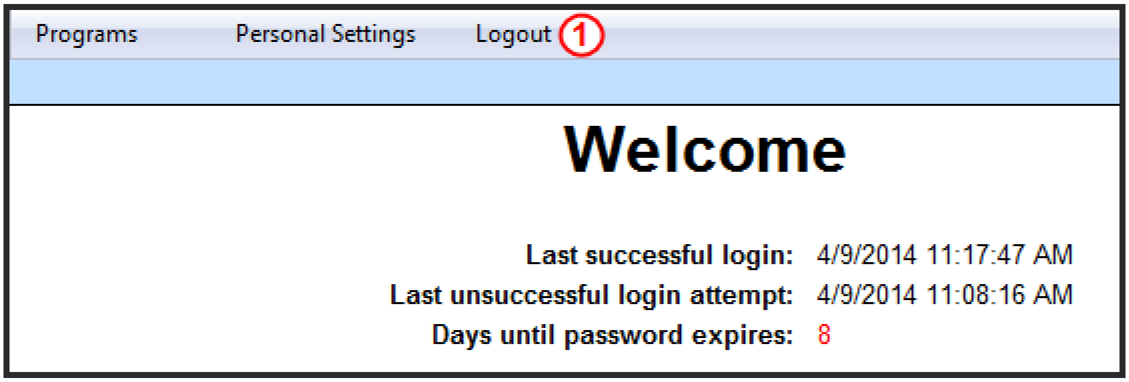
Menu	Purpose
1. OCD Grant	Choose this option to see a list of OCD Grant pages in OCEAN.
2. Application Search	Choose this option to navigate to the Application Search page for viewing/editing existing applications and adding new applications.

Personal Settings



Menu	Purpose
1. Change Organization	Choose this option to navigate to a page for selecting another organization that you are working with. You will only be able to access the organizations that you have been added as an authorized user using the “Going Online with ODSA – OCD Intake Forms” file. If you have access to a single organization, then this menu option will not be available for you.
2. Change Password	Choose this option to change your OCEAN password.

Logout



Menu	Purpose
1. Logout	Choose this option to logout and exit your session with the OCEAN application.

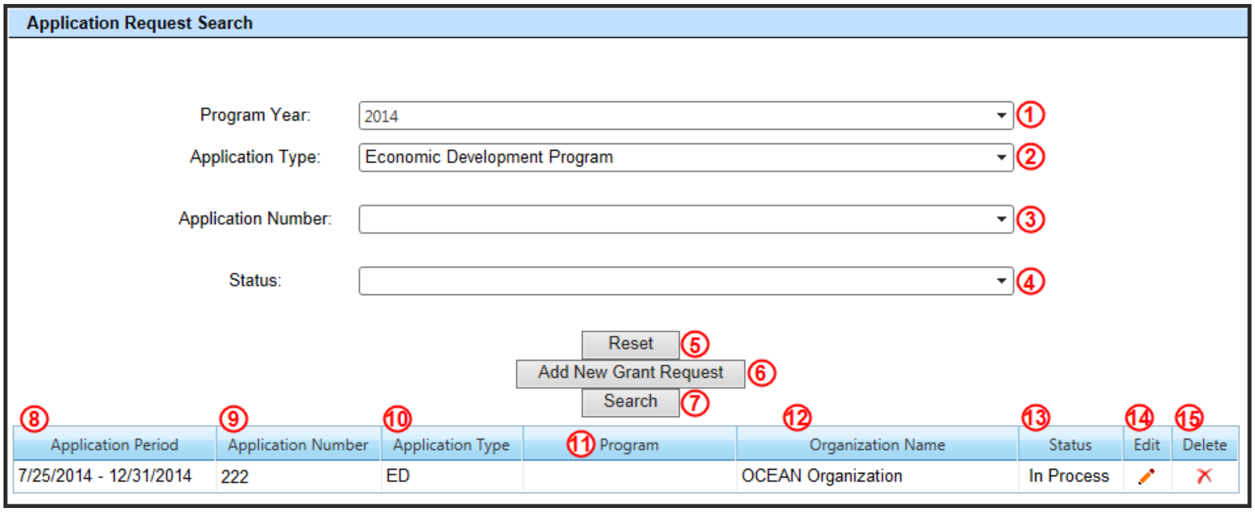
Completing an Application for ED

The following section describes the process for creating an application for the Economic Development Program (ED) in OCEAN.

To begin an application, you must first navigate to the Application Request Search page. Choose the following menus to display the Application Request Search page:

Programs → OCD Grant → Application Search

Application Request Search



Button/Field	Description
1. Program Year	Use this dropdown to select the program year of an application you would like to add or search for an existing application. The dropdown contains the current year as well as the previous ten years.
2. Application Type	Use this dropdown to select the application type you would like to add or search for an existing application. The list of application types will be limited by the applications that can be created by your organization as well as your own security permissions.
3. Application Number	Use this dropdown to refine the search results to an application number for the program year and application type selected.
4. Status	Use this dropdown to refine your search results to display applications that are currently in the selected status.
5. Reset	Choose this option to reset the search criteria and begin a new search.
6. Add New Grant Request	Choose this option to begin a new grant request. Prior to clicking this button, you must first select a program year and application type. *Note: If this button is disabled, then either: 1. You have reached the maximum number of requests allowable for the program year and application type selected. or 2. It is past the application period and you can no longer create applications for the program year and application type selected.
7. Search	Choose this option to display search results based on the search criteria defined above.
8. Application Period	Displays the period when applications can be submitted to OCD.
9. Application Number	Displays a unique assigned number for your application.
10. Application Type	Displays the type of application for the record.

11. Program	Displays the program type and program name.
12. Organization Name	Displays the name of the organization that created the application request.
13. Status	Displays the current status of the application.
14. Edit	Click the pencil icon to edit the application. *Note: Applications can only be edited when they are in an 'In Process' or 'Rejected to User' status. If they have been 'Submitted' to OCD or have been 'Approved,' then the application would open and be read only.
15. Delete	Click the red "x" icon to delete the application. *Note: Applications can only be deleted when they are in an 'In Process' status. Once they have been 'Submitted' to OCD, the applications can no longer be deleted.

The functions available from the Application Search page are listed below with steps for performing each function:

Search for an Application in OCEAN:

1. Select a **Program Year** and an **Application Type**.
2. Click the **Search** button.
3. Search results are displayed in the grid.

Add a New Application:

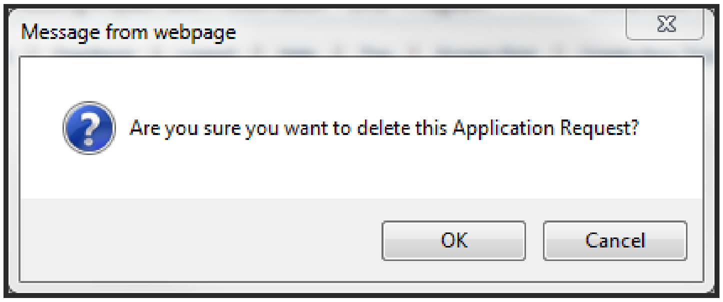
1. Select a **Program Year** and an **Application Type**.
2. Click the **Add New Grant Request** button.
3. You will navigate to the **Grant Request** page for adding a new application.

Edit an Existing Application:

1. Select a **Program Year** and an **Application Type**.
2. Click the **Search** button.
3. Search results are displayed in the grid.
4. Click the **Edit** icon next to an application that is in an 'In Process' status.
5. You will navigate to the **Grant Request** page for editing an existing application.

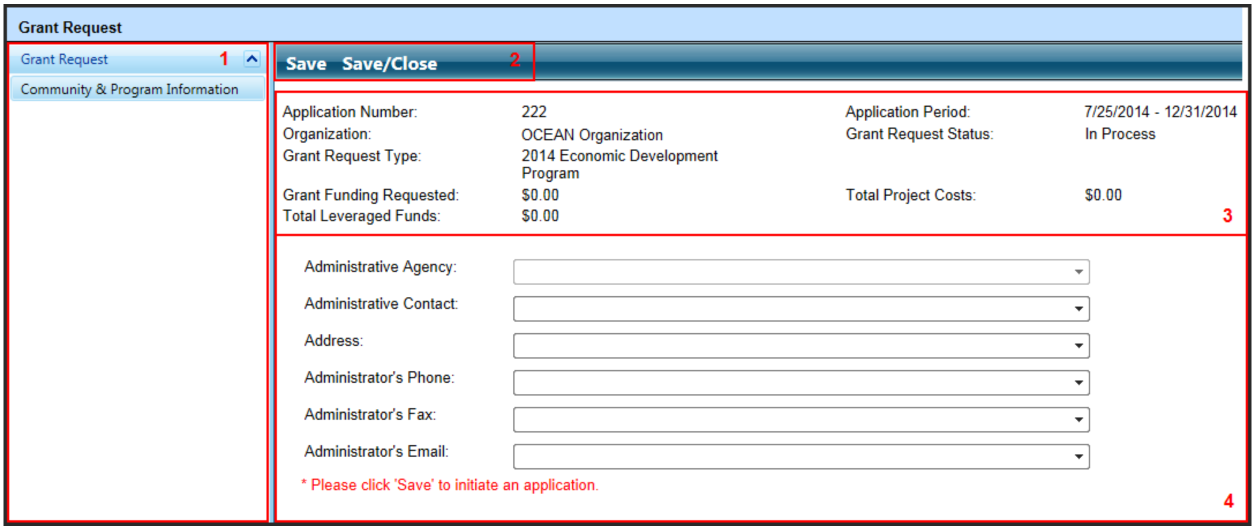
Delete an Existing Application:

1. Select a **Program Year** and an **Application Type**.
2. Click the **Search** button.
3. Search results are displayed in the grid.
4. Click the **Delete** icon next to an application that is in an 'In Process**'** status.
5. A message displays asking if you are sure you want to delete this Application Request.



6. Click **OK** to delete the application.

Grant Request



The Grant Request process is broken into four main sections:

1. **Left Navigation Panel** – This section lists the individual pages that will be completed as part of the ED application process. Clicking on an item in the left navigation updates section 4 with the details to be collected.
2. **Button Bar** – These buttons allow the user to save the application as additional details are entered up until the time it is ready to be submitted. Applications that are not completed will be saved as an “In Process” status. The buttons available in the button bar include:
   - **Save** – Saves the application in an “In Process” status and runs validations on the application for Economic Development. Any validation messages will be displayed for review and correction prior to the application being ready for submission.

Validation Message	Definition
All of the documents that are required have not been attached.	A document is listed on the Grant Request Documents page that has the checkbox checked for “Required,” but no response document has been uploaded. Upload your response document to clear this validation.
Total funds across activities ($$$) must equal $$$$ for the <<provider name>> provider leveraged fund.	All activity leveraged funds must total to the amounts you defined on the Financing Data page. Reallocate leveraged funds for this provider across the appropriate activities to clear this validation.
Project <<project name>>’s activity budget totals to $$ but should be $$$.	All activity budgets must total to the overall project budget. Reallocate activity budget dollars under this project to clear this validation.

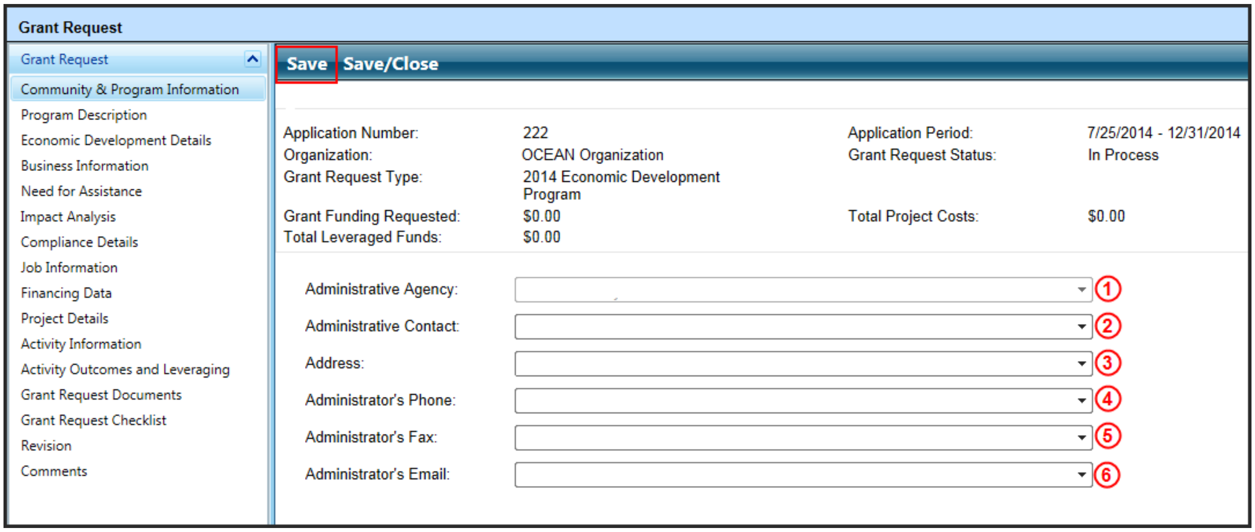
Economic Development Details must be filled in to submit the Grant Request	Click the Economic Development Details link in the left navigation, enter data in all fields, and click the ‘Save’ button.
Compliance Details must be filled in to submit the Grant Request	Click the Compliance Details link in the left navigation, enter data in all fields, and click the ‘Save’ button.
Job Information for project <<project type – project name>> must be filled in to submit the Grant Request.	Click the Job Information link in the left navigation, enter data in all fields, and click the ‘Save’ button. Complete the Job Information grid as well.
(Total Number of LMI FTEs Retained + Total LMI FTEs Expected to be Created) / (Total Retained Jobs + Total Created Jobs) must be greater than or equal to 51% for project <<project type – project name>>	Click the Job Information link in the left navigation, edit the Job Information records to obtain > 51% LMI.
Activity <<project and activity name>> needs at least one outcome measurement.	All activities need an outcome measurement (if applicable). Click the Activity Outcomes and Leveraging link in the left navigation and associate at least one outcome in the outcome grid to each activity that tracks outcomes.

Table 1

- **Save/Close** – Saves the application in an “In Process” status and returns you to the Application Request Search page.

3. **Header Details** – The header details section remains throughout the application. It gives an overview of the application, including:
    - **Application Number –** unique assigned number to the application
    - **Organization –** organization creating the application
    - **Grant Request Type –** program the application is being created for
    - **Grant Funding Requested –** total CDBG funds requested across all projects on this application
    - **Total Leveraged Funds –** total leveraged funds defined on the financing data page
    - **Grant Request Period –** application period for submitting applications
    - **Grant Request Status –** current status of the application
    - **Program Name –** displays the name of the program you entered on the Program Description page
    - **Total Project Costs –** all project costs equal to grant funding requested plus total leveraged funds
4. **Page Details –** This section shows the specific details to be entered for the page selected in the left navigation panel. The following pages detail each of these pages and the functions available for entering your application data.

Community & Program Information

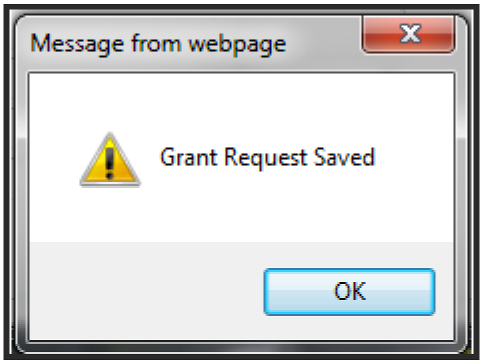


Field	Description
1. Administrative Agency	Displays your current organization as the administrative agency.
2. Administrative Contact	Use this dropdown to select the administrative contact from your organization for the ED application.
3. Address	This dropdown will populate with the current address on record for the administrative contact selected. If multiple addresses exist for the contact selected, then you can select the correct address from the dropdown.
4. Administrator's Phone	This dropdown will populate with the current phone number on record for the administrative contact selected (if supplied). If multiple phone numbers exist for the contact selected, then you can select the correct phone number from the dropdown.
5. Administrator's Fax	This dropdown will populate with the current fax number on record for the administrative contact selected (if supplied). If multiple fax numbers exist for the contact selected, then you can select the correct fax number from the dropdown.
6. Administrator's Email	This dropdown will populate with the current email address on record for the administrative contact selected. If multiple email addresses exist for the contact selected, then you can select the correct email address from the dropdown.

The functions available from the Community & Program Information page are listed below with steps for performing each function:

Initiate an Application

1. Select an **Administrative Contact** from the dropdown.
2. Verify the correct **Address** and **Email** are selected.
3. Click the **Save** button in the top button bar to initiate the application.
4. A message will display to inform you that the grant request has been saved.

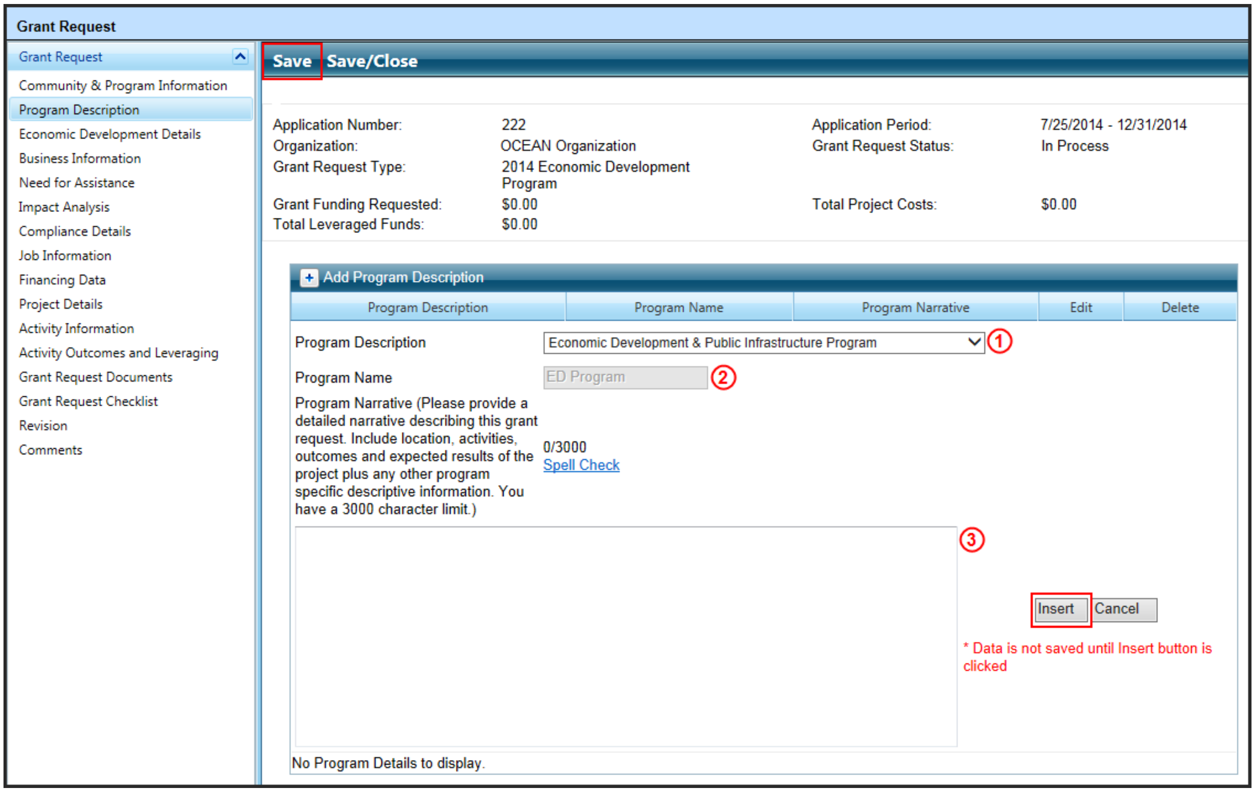


5. Click **OK** in the message box to continue.
6. The remaining pages of the grant application will be displayed in the left navigation panel.

Cancel Initiating a New Application

1. Navigate away from the **Community & Program Information** page by selecting another menu item in the main menu bar.
2. A new application will not be created.

Program Description



Field	Description
1. Program Description	This dropdown contains a list of potential programs available for the Grant Request you are creating. Only one program can be defined for each grant request. For ED, the only available program is: • Economic Development & Public Infrastructure Program
2. Program Name	For ED, this field will default to 'ED Program' and not be editable.
3. Program Narrative	Provide a detailed narrative describing this grant request. You must include the location, activities, outcomes and expected results of the project plus any other program specific descriptive information. This field has a 300 character limit, with a character counter displayed that will update as you type.

The functions available from the Program Description page are listed below with steps for performing each function:

Add Program Description

1. Click on the **Add Program Description** button in the grid.
2. The grid expands for adding a new program description record.
3. Select/enter details for all fields.

4. Click the **Insert** button.

Edit Program Description

1. Click on the **Edit** icon next to an existing program description record in the grid.
2. The grid expands for editing the program description record.
3. Edit the **Program Name** and/or **Program Narrative**. The **Program Description** field cannot be edited.
4. Click the **Update** button.
5. Program description details are updated.

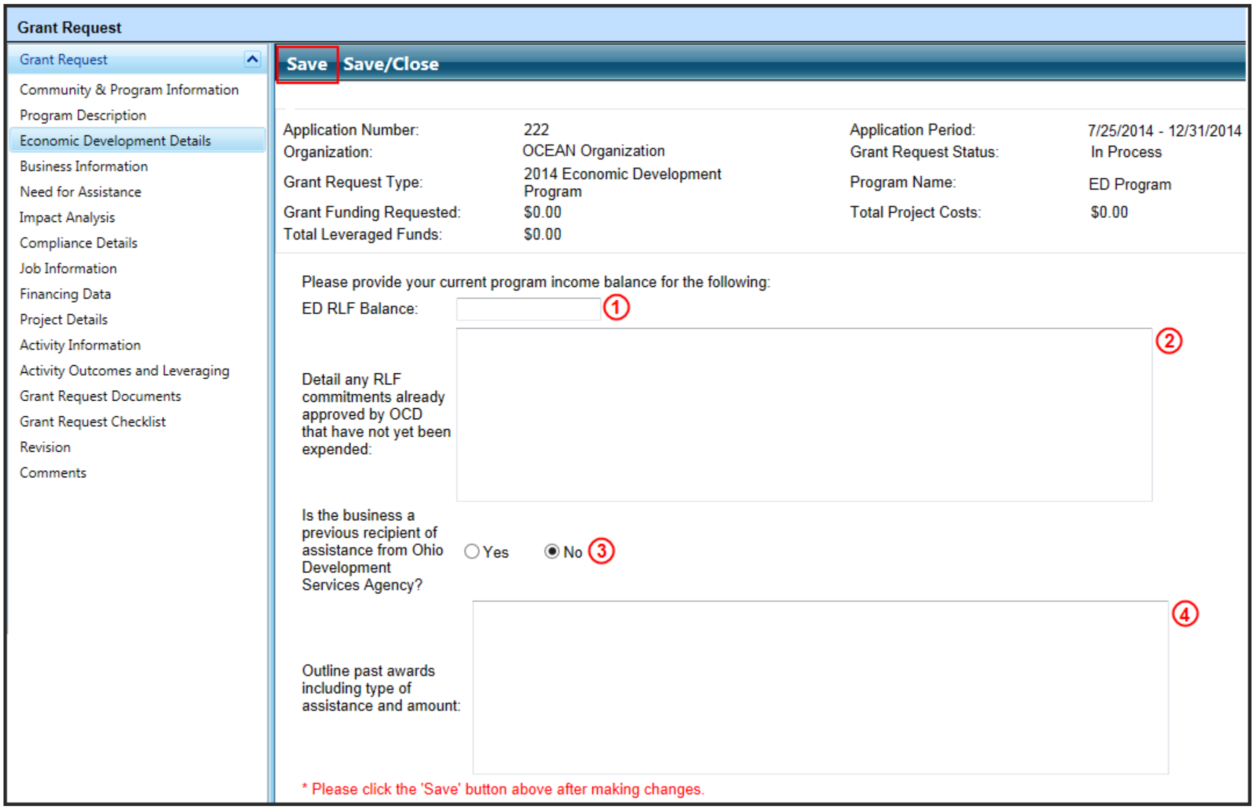
Cancel Adding/Editing Program Description

1. Click to either **Add Program Description** or **Edit** an existing program description in the grid.
2. The grid expands for adding/editing a program description record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Program Description

1. Click on the **Delete** icon next to an existing program description record in the grid.
2. Program Description record is deleted from the grid. *Note: When deleting a program description, all related Project Details, Job Information, Activity Information, and Activity Outcomes and Leveraging will be deleted as well.

Economic Development Details



Field	Description
1. ED RLF Balance	Enter your current program ED RLF income balance.
2. Detail any RLF commitments already approved by OCD that have not yet been expended	Describe any RLF commitments that have been approved by OCD that have not yet been expended in the text area provided.
3. Is the business a previous recipient of assistance from Ohio Development Services Agency?	Select yes or no if the business is a previous recipient of assistance from the Ohio Development Services Agency.
4. Outline past awards including type of assistance and amount	This field only displays if 'Yes' is selected for 'Is the business a previous recipient of assistance from Ohio Development Services Agency?' Enter details to describe past awards and the type of assistance and amounts.

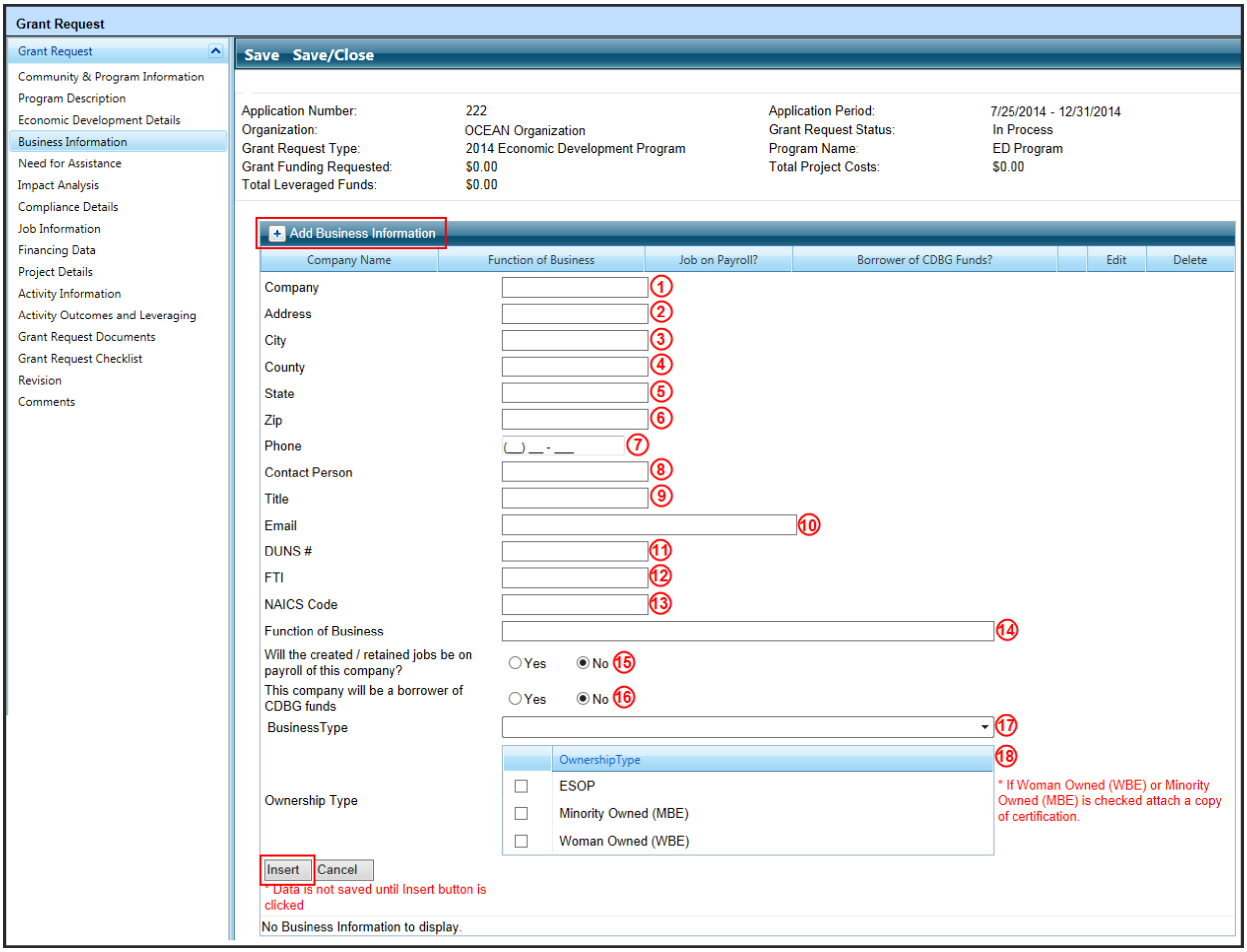
The functions available from the Economic Development Details page are listed below with steps for performing each function:

Save Economic Development Details

1. Enter details for all fields on the page.

2. Click the **Save** button in the top button bar.

Business Information



Field	Description
1. Company	Enter the name of the company.
2. Address	Enter the address of the business.
3. City	Enter the city of the business address.
4. County	Enter the county of the business address.
5. State	Enter the state of the business address.
6. Zip	Enter the zip of the business address.
7. Phone	Enter the phone number of the business.
8. Contact Person	Enter the main contact person for the business.
9. Title	Enter the contact person's title.
10. Email	Enter the contact person's email.
11. DUNS #	Enter the DUNS # of the business.
12. FTI	Enter the FTI number of the business.

13. NAICS Code	Enter the NAICS Code of the business.
14. Function of Business	Enter a description of the function of the business.
15. Will the created / retained jobs be on payroll off this company?	Select yes or no if the created / retained jobs will be on the payroll of the business.
16. This company will be a borrower of CDBG funds	Select yes or no if the company will be a borrower of CDBG funds.
17. Business Type	Select the business type from the dropdown. Dropdown choices include: • C Corporation • Partnership • Joint Venture • S Corporation • Limited Partnership • Limited Liability Partnership • Sole Proprietorship
18. Ownership Type	Select the ownership type(s) from the options displayed. The choices include: • ESOP • Minority Owned (MBE) • Woman Owned (WBE)

The functions available from the Business Information page are listed below with steps for performing each function:

Add Business Information

1. Click on the **Add Business Information** button in the grid.
2. The grid expands for adding a business information record.
3. Enter all business information details.
4. Click the **Insert** button.
5. Business information details are saved.
6. Repeat Steps 1 – 5 for each business for your grant request.

Edit Business Information

1. Click on the **Edit** icon next to an existing business information record in the grid.
2. The grid expands for editing the business information record.
3. Edit the business information details.
4. Click the **Update** button.
5. Business information details are saved.

Cancel Adding/Editing Business Information

1. Click to either **Add Business Information** or **Edit** an existing business information record in the grid.

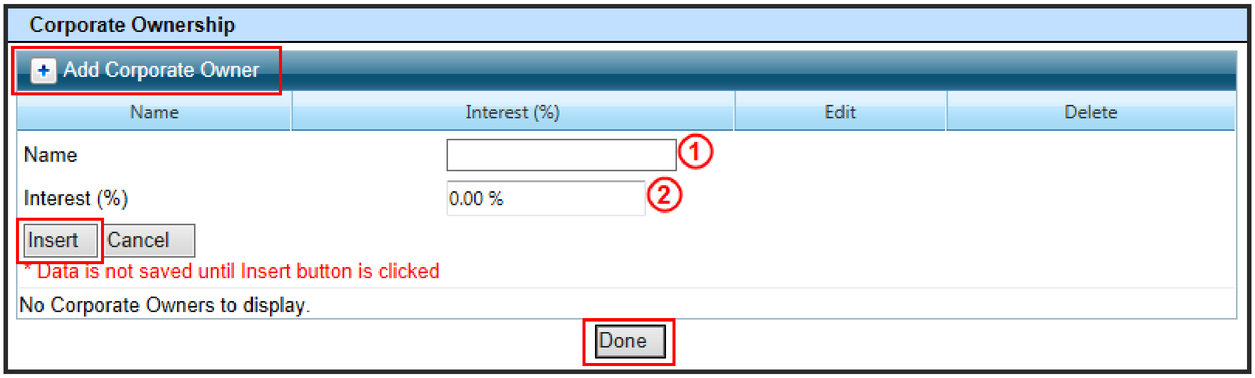
2. The grid expands for adding/editing a business information record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Business Information

1. Click on the **Delete** icon next to an existing business information record in the grid.
2. Business information record is deleted from the grid.

Corporate Ownership

This popup displays when the user clicks the **Ownerships** link in the grid next to a business information record.



The functions available from the Corporate Ownership popup are listed below with steps for performing each function:

Add Corporate Owner

1. Click on the **Add Corporate Owner** button in the grid.
2. The grid expands for adding a corporate owner record.
3. Enter all corporate owner details.
4. Click the **Insert** button.
5. Corporate owner details are saved.
6. Repeat Steps 1 – 5 for each corporate owner on your application.
7. Click the **Done** button to return to the business information page.

Edit Corporate Owner

1. Click on the **Edit** icon next to an existing corporate owner record in the grid.
2. The grid expands for editing the corporate owner record.
3. Edit the corporate owner details.
4. Click the **Update** button.
5. Corproate owner details are updated.
6. Click the **Done** button to return to the business information page.

Cancel Adding/Editing Coprorate Owner

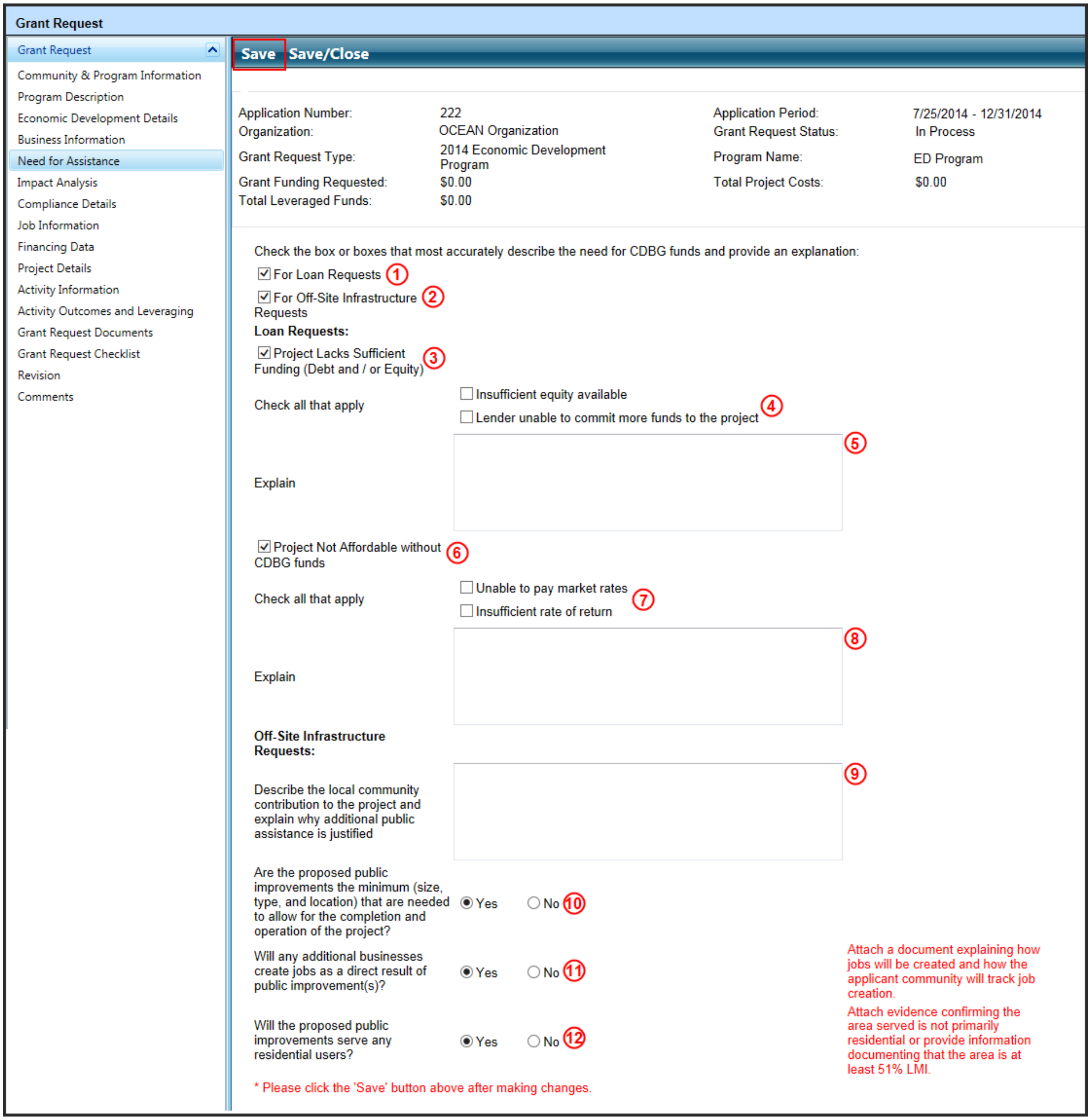
1. Click to **Add Corporate Owner** or **Edit** an existing corporate owner record in the grid.
2. The grid expands for adding/editing a corporate owner record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Corporate Owner

1. Click on the **Delete** icon next to an existing corporate owner record in the grid.

2. Corporate owner record is deleted from the grid.

Need for Assistance



Field	Description
1. For Loan Requests	Check this box if you need CDBG funds for loan requests.
2. For Off-Site Infrastructure	Check this box if you need CDBG funds for off-site infrastructure.
3. Project Lacks Sufficient Funding (Debt and / or Equity)	This field only displays when 'For Loan Requests' is checked. Check this box if the project lacks sufficient funding.

4. Check all that apply	This field only displays when 'Project Lacks Sufficient Funding (Debt and / or Equity)' is checked. Check all boxes that apply.
5. Explain	This field only displays when 'Project Lacks Sufficient Funding (Debt and / or Equity)' is checked. Write an explanation for each option selected above.
6. Project Not Affordable without CDBG funds	This field only displays when 'For Loan Requests' is checked. Check this box if the project is not affordable without CDBG funds.
7. Check all that apply	This field only displays when 'Project Not Affordable without CDBG funds' is checked. Check all boxes that apply.
8. Explain	This field only displays when 'Project Not Affordable without CDBG funds' is checked. Write an explanation for each option selected above.
9. Describe the local community contribution to the project and explain why additional public assistance is justified	This field only displays when 'For Off-Site Infrastructure Requests' is checked. Desribe the local community contribution in the texct area provided and explain why additional public assistance is justified for the project.
10. Are the proposed public improvements the minimum (size, type, and location) that are needed to allow for the completion and operation of the project?	Select yes or no if the proposed public improvement are the minimum needed for the completion and operation of the project.
11. Will any additional businesses create jobs as a direct result of public improvement(s)?	Select yes or no if any additional businesses will create jobs as a direct result of public improvement(s). If 'Yes' is selected, then a message displays, "Attach a document explaining how jobs will be created and how the application community will track job creation." Go to the Grant Request Documents page and click to 'Add Document' in the bottom grid. Upload the document specified.
12. Will the proposed public improvments serve any residential users?	Select yes or no if the proposed public improvements will serve any residential users. If 'Yes' is selected, then a message displays, "Attach evidence confirming the area served is not primarily residential or provide information documenting that the area is at least 51% LMI. Go to the Grant Request Documents page and click to 'Add Document' in the bottom grid. Upload the document specified.

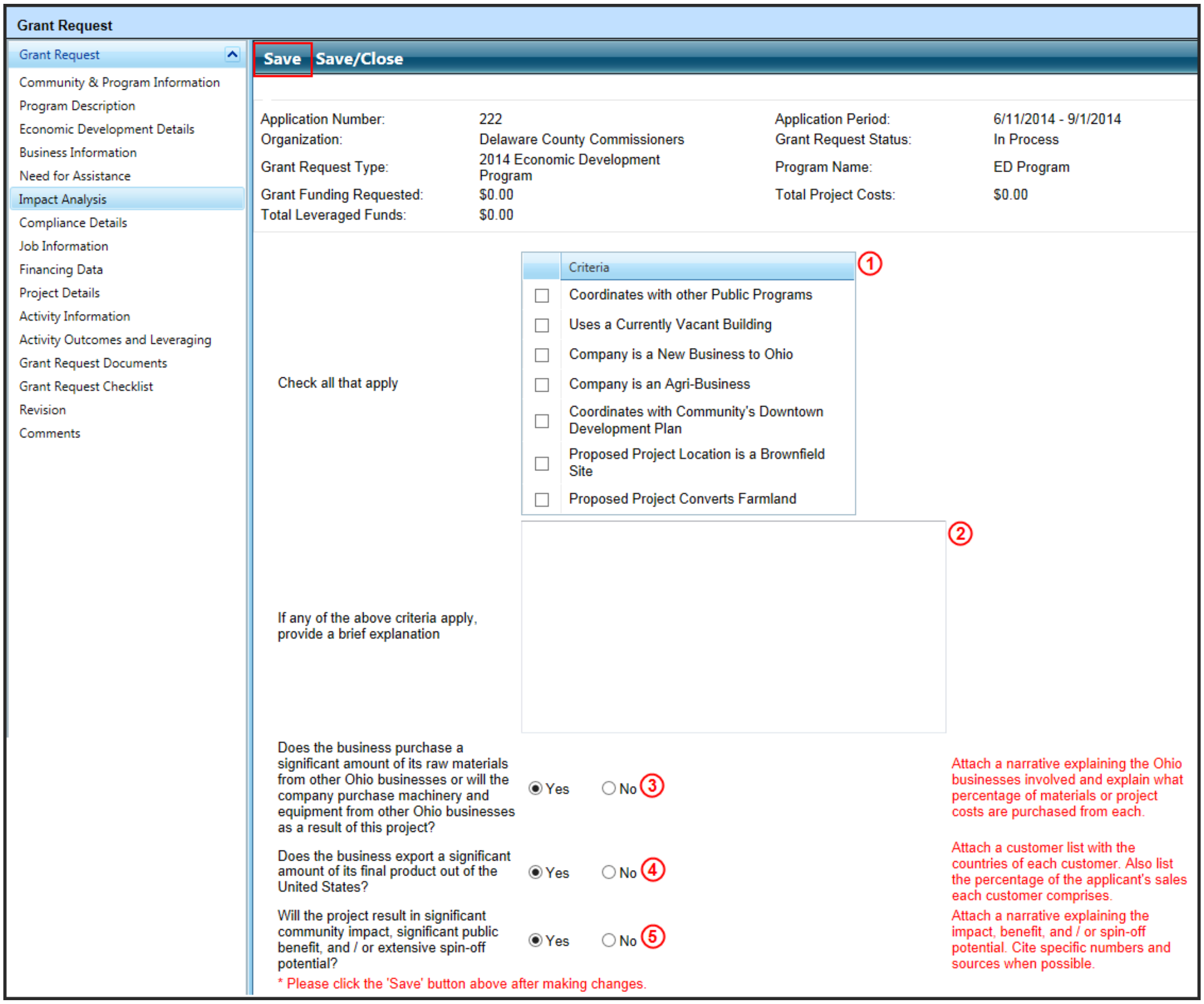
The functions available from the Need for Assistance page are listed below with steps for performing each function:

Save Need for Assistance

1. Enter details for all required fields on the need for assistance page.

2. Click the **Save** button in the top button bar.

Impact Analysis



Field	Description
1. Check all that apply	Check each box that applies for your application. The choices include: • Coordinates with other Public Programs • Uses a Currently Vacant Building • Company is a New Business to Ohio • Company is an Agri-Business • Coordinates with Community's Downtown Development Plan • Proposed Project Location is a Brownfield Site • Proposed Project Converts Farmland
2. If any of the above criteria apply, provide a brief explanation	If at least one checkbox was checked in the 'Check all that apply' criteria, then provide an explanation in the text area provided.

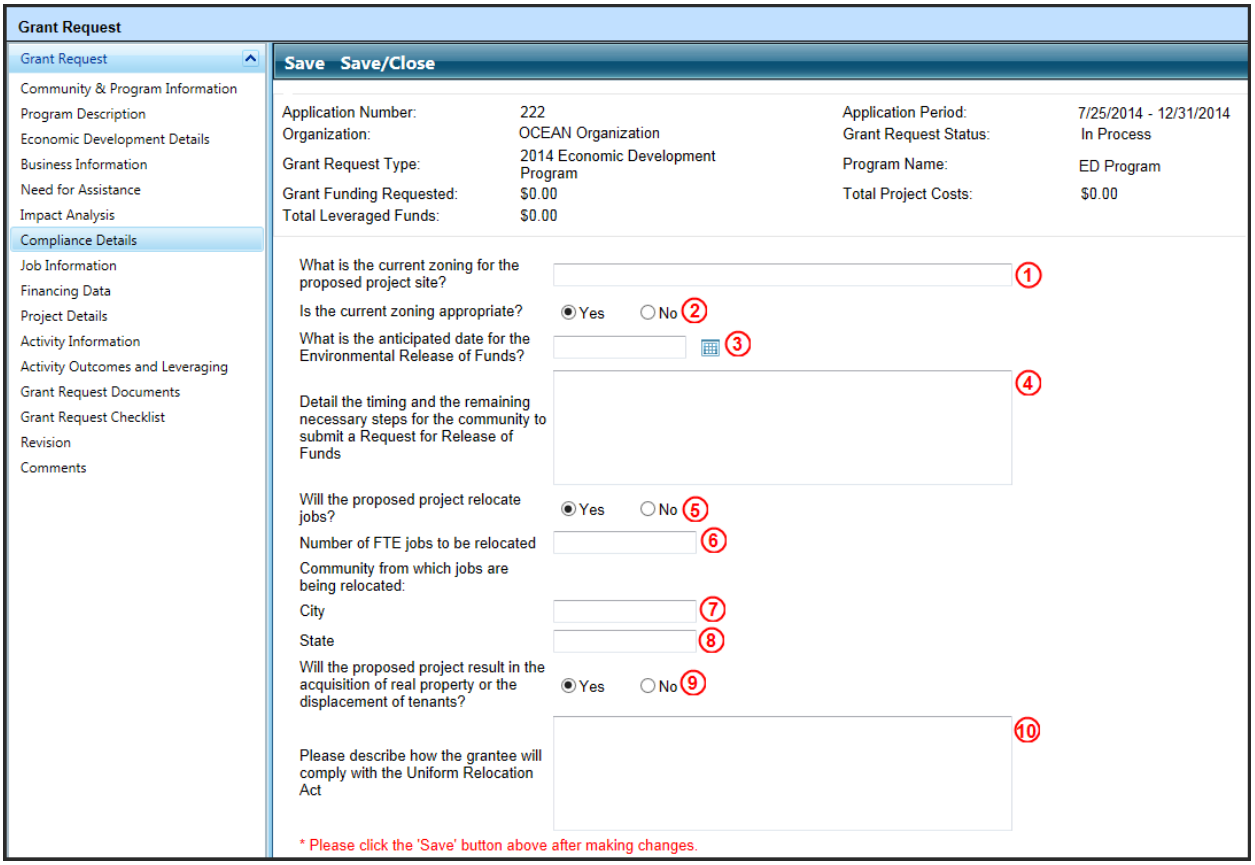
3. Does the business purchase a significant amount of its raw materials from other Ohio businesses or will the company purchase machinery and equipment from other Ohio businesses as a result of this project?	Select yes or no if the business purchases its raw materials from other Ohio businesses or if the company will purchase machinery and equipment from other Ohio businesses as a result of this project. If 'Yes' is selected, then the following message displays, "Attach a narrative explaining the Ohio businesses involved and explain what percentage of materials or project costs are purchased from each." Go to the Grant Request Documents page and click to 'Add Document' in the bottom grid. Upload the document specified.
4. Does the business export a significant amount of its final product out of the United States?	Select yes or no if the business exports a significant amount of its final product out of the United States. If 'Yes' is selected, then the following message displays, "Attach a customer list with the countries of each customer. Also list the percentage of the applicant's sales each customer comprises. Go to the Grant Request Documents page and click to 'Add Document' in the bottom grid. Upload the document specified.
5. Will the project result in significant impact, significant public benefit, and / or extensive spin-off potential?	Select yes or no if the project will result in significant impact, significant public benefit, and/or extensive spin-off potential. If 'Yes' is selected, then the following message displays, "Attach a narrative explaining the impact, benefit, and / or spin-off potential. Cite specific numbers and sources when possible." Go to the Grant Request Documents page and click to 'Add Document' in the bottom grid. Upload the document specified.

The functions available from the Impact Analysis page are listed below with steps for performing each function:

Save Impact Analysis

1. Enter details for all required fields on the impact analysis page.
2. Click the **Save** button in the top button bar.

Compliance Details



Field	Description
1. What is the current zoning for the proposed project site?	Enter the current zoning for the proposed project site.
2. Is the current zoning appropriate?	Select yes or no if the current zoning is appropriate.
3. What is the anticipated date for the Environmental Release of Funds?	Click the calendar icon and select the anticipated date for the Environmental Release of Funds.
4. Detail the timing and the remaining necessary steps for the community to submit a Request for Release of Funds.	Enter details for the timing and the remaining necessary steps for the community to submit a Request for Release of Funds in the text area provided.
5. Will the proposed project relocate jobs?	Select yes or no if the project will relocate jobs.
6. Number of FTE jobs to be relocated	This field only displays if 'Yes' is selected for 'Will the proposed project relocate jobs?' Enter the number of FTE jobs to be relocated.

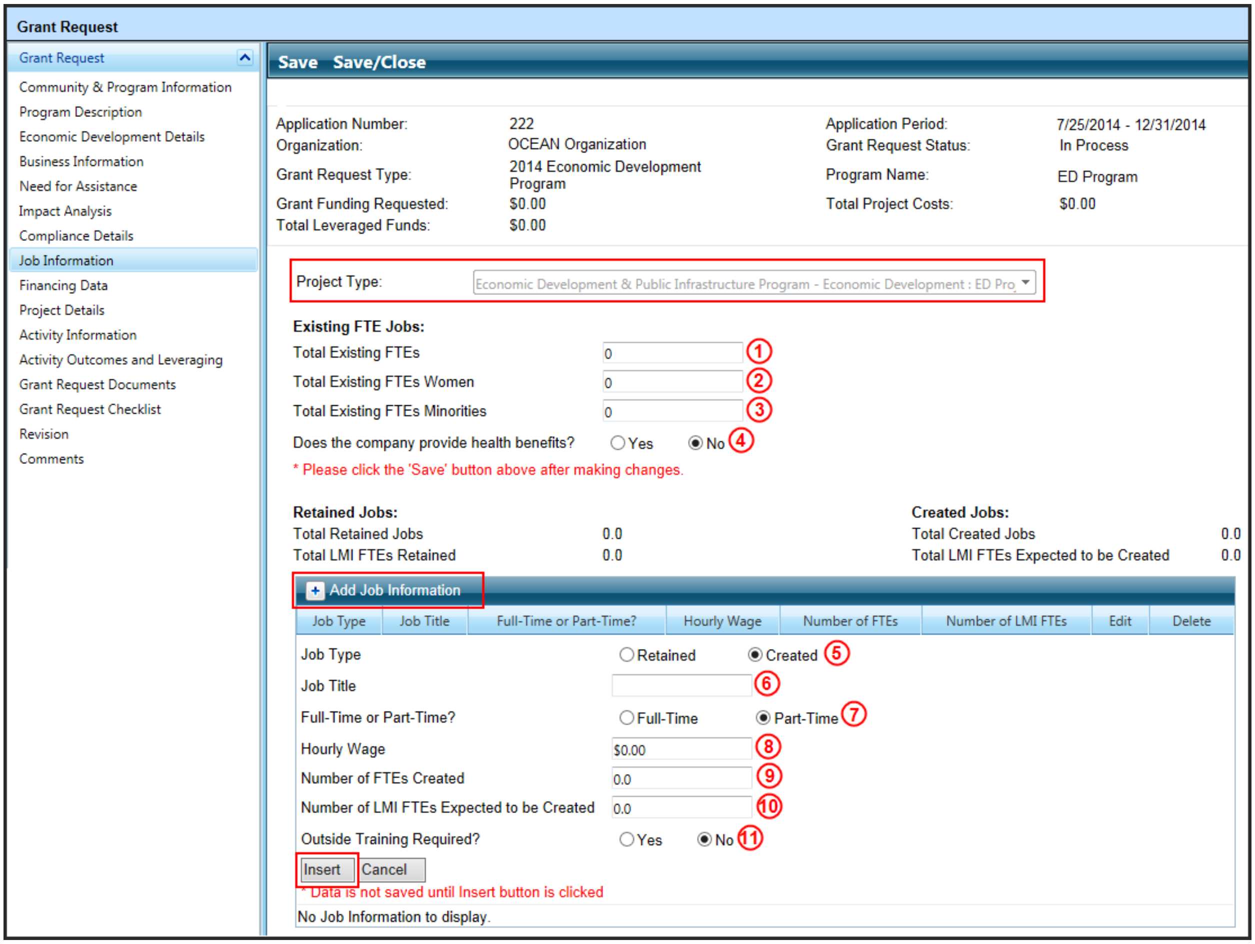
7. City	This field only displays if 'Yes' is selected for 'Will the proposed project relocate jobs?' Enter the city of the community from which jobs are being relocated.
8. State	This field only displays if 'Yes' is selected for 'Will the proposed project relocate jobs?' Enter the state of the community from which jobs are being relocated.
9. Will the proposed project result in the acquisition of real property or the displacement of tenants?	Select yes or no if the proposed project will result in the acquisition of real property or the displacement of tenants.
10. Please describe how the grantee will comply with the Uniform Relocation Act	This field only displays if 'Yes' is selected for 'Will the proposed project result in the acquisition of real property or the displacement of tenants?' Enter details to describe how the grantee will comply with the Uniform Relocation Act.

The functions available from the Compliance Details page are listed below with steps for performing each function:

Save Compliance Details

1. Enter details for all required fields on the compliance details page.
2. Click the **Save** button in the top button bar.

Job Information



Field	Description
1. Total Existing FTEs	Enter the total number of existing FTE jobs for the project selected.
2. Total Existing FTEs Women	Enter the total number of existing FTE jobs held by women for the project selected.
3. Total Existing FTEs Minorities	Enter the total number of existing FTE jobs held by minorities for the project selected.
4. Does the company provide health benefits?	Select yes or no if the company provides health benefits for the project selected.
5. Job Type	Select the job type for the job being entered. The job type is either 'Retained' or 'Created.'
6. Job Title	Enter the title for the job being entered.
7. Full-Time or Part-Time?	Select whether the job being entered is a full-time or part-time job.
8. Hourly Wage	Enter the hourly wage for the job being entered.
9. Number of FTEs Created / Retained	Enter the number of FTEs that will be created / retained for the job being entered.

10. Number of LMI FTEs Expected to be Created / Retained	Of the total number of FTEs being created / retained, enter the number that is expected to be LMI.
11. Outside Training Required?	This field only displays for job records that are of job type 'Created.' Select yes or no if outside training is required.

The functions available from the Job Information page are listed below with steps for performing each function:

Save Job Information

1. Select a project from the **Project Type** dropdown at the top of the page.
2. Enter details for all required fields on the job information page.
3. Click the **Save** button in the top button bar.
4. Repeat steps 1 – 3 for each project type in the project type dropdown until job information has been added for all projects.

Add Job Information

1. Select a project from the **Project Type** dropdown at the top of the page.
2. The job information grid refreshes to show all jobs currently associated with the selected project.
3. Click on the **Add Job Information** button in the grid.
4. The grid expands for adding a job information record.
5. Enter all job information details.
6. Click the **Insert** button.
7. Repeat Steps 3 – 7 for each job information record you need to add for the project type selected.
8. Repeat Steps 1 – 8 for each project type in the project dropdown until job information records have been added for all projects.

Edit Job Information

1. Click on the **Edit** icon next to an existing job information record in the grid.
2. The grid expands for editing the job information record.
3. Edit the job information details.
4. Click the **Update** button.
5. Job information details are updated.

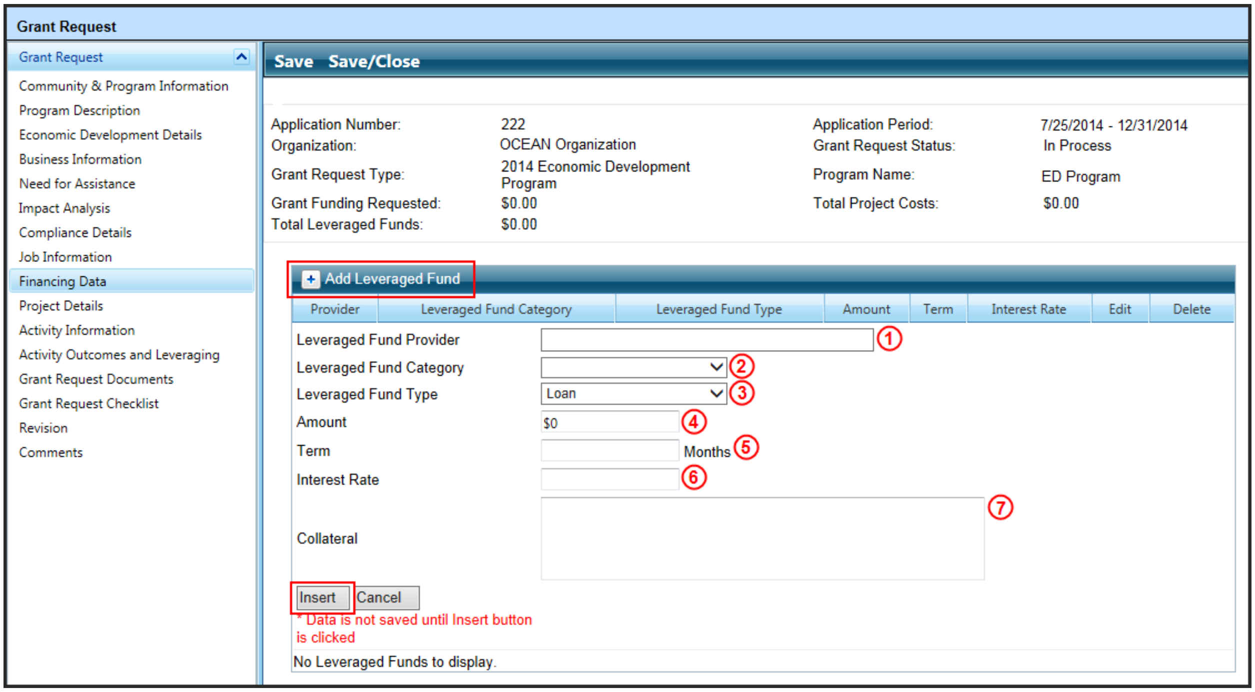
Cancel Adding/Editing Job Information

1. Click to either **Add Job Information** or **Edit** an existing job information record in the grid.
2. The grid expands for adding/editing a job information record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Job Information

1. Click on the **Delete** icon next to an existing job information record in the grid.
2. Job information record is deleted from the grid.

Financing Data



Field	Description
1. Leveraged Fund Provider	Enter the name of the leveraged fund provider in the textbox.
2. Leveraged Fund Category	Select the category for the leveraged fund from the dropdown. Dropdown choices include: • Federal ARC Funds • Other Federal • Other Funds • Private Funds • State and Local Funds • CDBG RLF
3. Leveraged Fund Type	Select the type of leveraged fund from the dropdown. Dropdown choices include: • Grant • In Kind • Loan
4. Amount	Enter the dollar amount of leveraged funds for the provider entered.
5. Term	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the number of months of the loan.
6. Interest Rate	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the percentage interest rate of the loan.
7. Collateral	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter collateral details in the text area provided.

The functions available from the Financing Data page are listed below with steps for performing each function:

Add Leveraged Fund

1. Click on the **Add Leveraged Fund** button in the grid.
2. The grid expands for adding a leveraged fund record.
3. Enter all leveraged fund details.
4. Click the **Insert** button.
5. Leveraged Fund details are saved.
6. Repeat Steps 1 – 5 for each provider of leveraged funds for your grant request.

Edit Leveraged Fund

1. Click on the **Edit** icon next to an existing leveraged fund record in the grid.
2. The grid expands for editing the leveraged fund record.
3. Edit the leveraged fund details.
4. Click the **Update** button.
5. Leveraged fund details are updated.

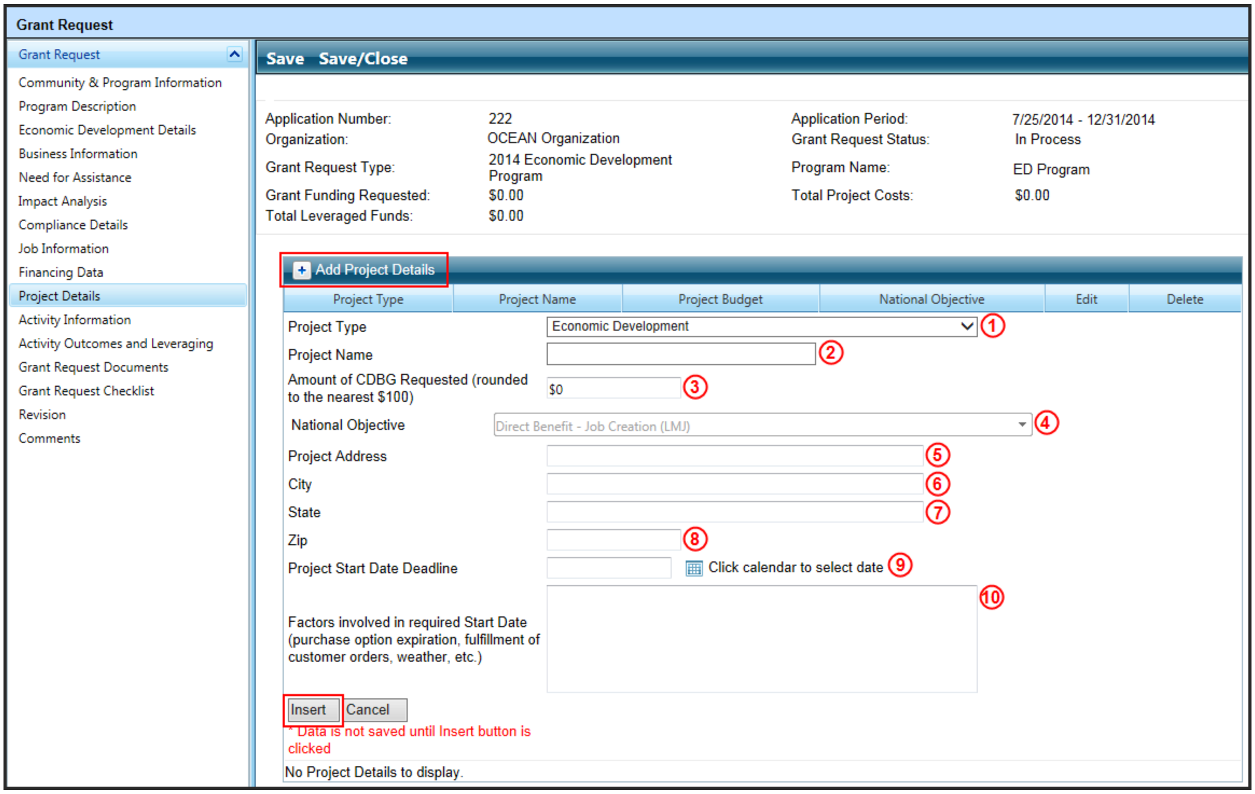
Cancel Adding/Editing Leveraged Fund

1. Click to either **Add Leveraged Fund** or **Edit** an existing leveraged fund in the grid.
2. The grid expands for adding/editing a leveraged fund record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Leveraged Fund

1. Click on the **Delete** icon next to an existing leveraged fund record in the grid.
2. Leveraged fund record is deleted from the grid. *Note: When deleting a leveraged fund, all related Activity Leveraging Funds will be deleted as well.

Project Details



Field	**Description**
1. Project Type	Select the project type from the dropdown. For ED, the available project types include: • Economic Development • Administration Only one project for each project type can be added to the ED grant request.
2. Project Name	For 'Economic Development' project types, enter the name for the project that uniquely identifies this project from all other Economic Development projects. For 'Administration' project types, this field will default to 'Administration' and not be editable.
3. Amount of CDBG Requested (rounded to the nearest $100.00)	Enter the amount of CDBG requested for the project.
4. National Objective	This field will default based on the project type selected. If the project type selected is 'Economic Development,' then the national objective defaults to 'Direct Benefit – Job Creation (LMJ)' and is not editable. If the project type selected is 'Administration,' then the national objective defaults to 'Administration' and is not editable.
5. Project Address	This field only displays for 'Economic Development' project types. Enter the address for the project.

6. City	This field only displays for 'Economic Development' project types. Enter the city for the address of the project.
7. State	This field only displays for 'Economic Development' project types. Enter the state for the address of the project.
8. Zip	This field only displays for 'Economic Development' project types. Enter the zip for the address of the project.
9. Project Start Date Deadline	This field only displays for 'Economic Development' project types. Click on the calendar icon and select the deadline date for the project start.
10. Factors involved in required Start Date (purchase option expiration, fulfillment of customer orders, weather, etc.)	This field only displays for 'Economic Development' project types. Detail the factors that are involed in the required start date in the text area provided.

The functions available from the Project Details page are listed below with steps for performing each function:

Add Project Detail

1. Click on the **Add Project Details** button in the grid.
2. The grid expands for adding a project detail record.
3. Enter all project detail information.
4. Click the **Insert** button.
5. Project Details information is saved.
6. Repeat Steps 1 – 5 for each project on your grant request.

Edit Project Detail

1. Click on the **Edit** icon next to an existing project detail record in the grid.
2. The grid expands for editing the project detail record.
3. Edit the project detail information.
4. Click the **Update** button.
5. Project detail information is updated.

Cancel Adding/Editing Project Detail

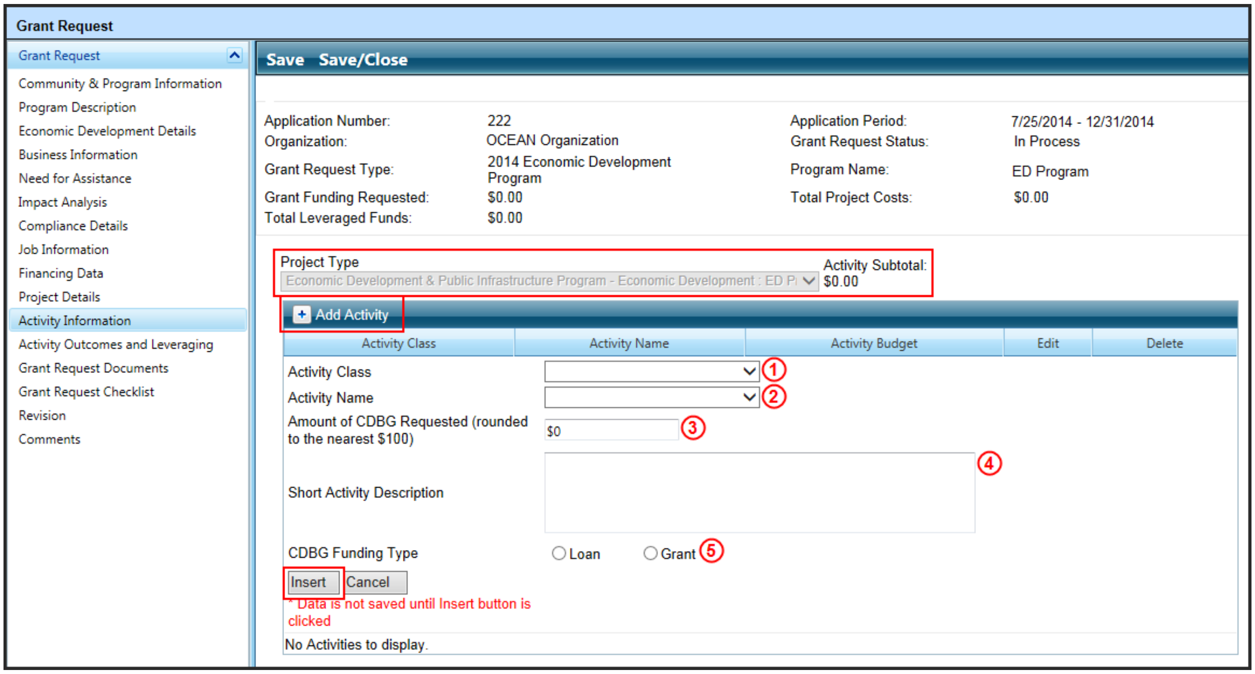
1. Click to either **Add Project Details** or **Edit** an existing project detail record in the grid.
2. The grid expands for adding/editing a project detail record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Project Detail

1. Click on the **Delete** icon next to an existing project detail record in the grid.
2. Project detail record is deleted from the grid. *Note: When deleting a project detail record, all related Job Information, Activity Information, and Activity Outcomes and

Leveraging records will be deleted as well.

Activity Information



Field	Description
1. Activity Class	Select an activity class for the new activity. For 'Administration' project types, the available activity class options include: • Administration For 'Economic Development' project types, the available activity class options include: • Economic Dev. • Housing
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the activity class that is selected. See Table 2 below for potential activity names per activity class.
3. Amount of CDBG Requested (rounded to the nearest $100)	Enter the amount of CDBG requested. All activity amounts for the activities on the project must total up to the project CDBG requested.
4. Short Activity Description	Enter your short activity description narrative here.
5. CDBG Funding Type	Select 'Loan' or 'Grant' for the CDBG funding type.

Activity Class	Activities	
Administration	• General Admin	
Economic Dev.	• Acquisition • Demolition / Clearance • Flood & Drainage Facilities • Leasehold Improvements • Machine / Cap. Equipment • Moving Costs • New Construction • Non-capital Equipment • Off-Site Improvements • Other Costs • Parking Facilities	• Private Rehabilitation • Professional Fees • Public Utilities • Sewer Fac. Improvements • Solid Waste Disposal Fac. • Street Improvements • Training / Technical Assistance • Water & Sewer Facilities • Water Fac. Improvements • Working Capital
Housing	• Relocation Pymt. & Asst.	

Table 2

The functions available from the Activity Information page are listed below with steps for performing each function:

Add Activity

1. Select a project from the **Project Type** dropdown above the activity grid.
2. The activity grid refreshes to show all activities currently associated with the selected project.
3. Click on the **Add Activity** button in the grid.
4. The grid expands for adding an activity record.
5. Enter all activity details.
6. Click the **Insert** button.
7. Activity details are saved.
8. Repeat Steps 3 – 7 for each activity you need to add for the project type selected.
9. Repeat Steps 1 – 8 for each project type in the project dropdown until activities have been added for all projects.

Edit Activity

1. Click on the **Edit** icon next to an existing activity record in the grid.
2. The grid expands for editing the activity record.
3. Edit the activity details.
4. Click the **Update** button.
5. Activity details are updated.

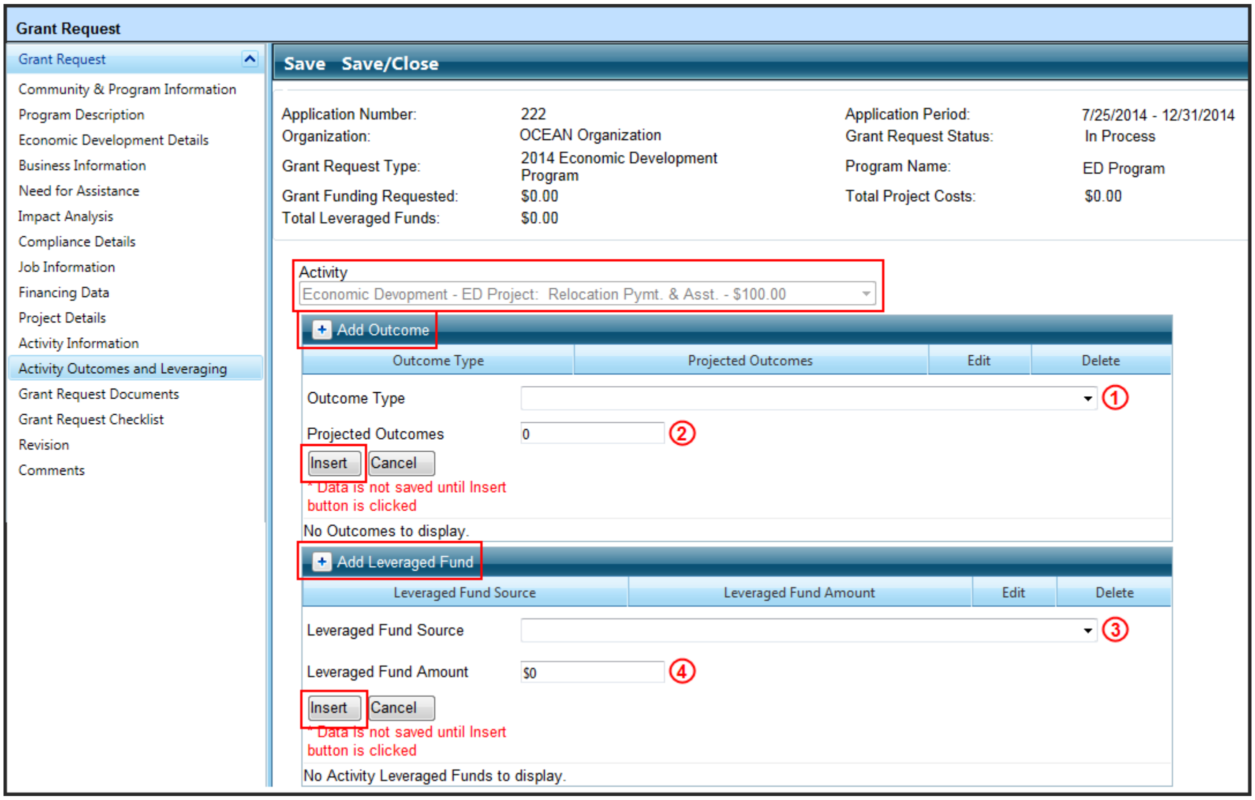
Cancel Adding/Editing Activity

1. Click to either **Add Activity** or **Edit** an existing activity record in the grid.
2. The grid expands for adding/editing an activity record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Activity

1. Click on the **Delete** icon next to an existing activity record in the grid.
2. Activity record is deleted from the grid. *Note: When deleting an activity record, all related Activity Outcomes and Leveraging records will be deleted as well.

Activity Outcomes and Leveraging



Field	Description
1. Outcome Type	Select the outcome type from the dropdown. The dropdown choices depend on the activity that the outcome is being added for. See Table 3 below for potential outcome types per activity.
2. Projected Outcomes	Enter the projected number of outcomes for the activity.
3. Leveraged Fund Source	Select a source of leveraged funds for the activity. The dropdown choices for the leveraged fund source include a list of the leveraged fund providers defined on the financing data page.
4. Leveraged Fund Amount	Enter the amount of leveraged funds from this provider that will be funding the activity selected.

Activity	Outcomes	
Acquisition	• Acres of Land • Square Feet of Structure • Structures • Parcels	• Households Assisted • Business Buyouts • Permanent Easements / Right-of-Way
Demolition / Clearance	• Structures Demolished	
Flood & Drainage Facilities	• Linear Feet • Culverts / Catch Basins Installed	• Manholes Installed • Permanent Easements / Right-of-Way
Leasehold Improvements	• Square Feet of Structure	

Machine / Cap. Equipment	• Items of Equipment Purchased	
New Construction	• Square Feet of Structure • Unit Constructed – Owner	• Units Constructed – Rental • Units Acquired, Constructed and Sold
Non-capital Equipment	• Items of Equipment Purchased	
Parking Facilities	• Square Feet of Pavement/Landscaping	• Parking Spaces
Private Rehabilitation	• Square Feet of Structure • Units Rehabbed – Owner • Units Repaired – Owner	• Facades Improved • Hslds Asst. with Counseling/Education • Lead Safe Units
Public Utilities	• Utility Poles/Lines Relocated	
Relocation Pymt. & Asst.	• Households Assisted • Businesses/Organizations Assisted	• Households Assisted – Opt. Relocation
Sewer Fac. Improvements	• Items of Equip. Installed/Repaired • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Manholes Installed • Permanent Easements/Right-of-Way
Sidewalk Improvements	• Linear Feet • Curbcuts Installed	• Linear Feet of Curbs
Solid Waste Disposal Fac.	• Items of Equip. Installed/Repaired	• Facility Constructed/Rehabbed
Street Improvements	• Linear Feet • Culverts/Catch Basins Installed • Bridges Replaced/Repaired • Traffic Control/St. Signs Installed	• Trees, Benches, Str Lights and Planters • Slips/Slides/Retain Walls Repaired • Permanent Easements/Right-of-Way • Linear Feet of Curbs
Training / Technical Assistance	• Households Assisted	
Water & Sewer Facilities	• Items of Equip. Installed/Repaired • Fire Hydrants Installed • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Manholes Installed • Water Valves Installed • Permanent Easements/Right-of-Way
Water Fac. Improvements	• Items of Equip. Installed/Repaired • Fire Hydrants Installed • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Installed • Wells Drilled • Water Valves Installed • Permanent Easements/Right-of-Way

Table 3

The functions available from the Activity Outcomes and Leveraging page are listed below with steps for performing each function:

Add Outcome

1. Select an activity from the **Activity** dropdown above the outcomes and/or leveraged fund grid.

2. The outcomes and/or leveraged funds grids refresh to show all records currently associated with the selected activity.
3. Click on the **Add Outcome** button in the outcomes grid.
4. The grid expands for adding an outcome record.
5. Enter all outcome details.
6. Click the **Insert** button.
7. Outcome details are saved.
8. Repeat Steps 2 – 7 for each outcome you need to add for the activity selected.
9. Repeat Steps 1 – 8 for each activity in the activity dropdown until outcomes have been added for all applicable activities.

Edit Outcome

1. Click on the **Edit** icon next to an existing outcome record in the grid.
2. The grid expands for editing the outcome record.
3. Edit the outcome details.
4. Click the **Update** button.
5. Outcome details are updated.

Cancel Adding/Editing Outcome

1. Click to either **Add Outcome** or **Edit** an existing outcome record in the grid.
2. The grid expands for adding/editing an outcome record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Outcome

1. Click on the **Delete** icon next to an outcome record in the grid.
2. Outcome record is deleted from the grid.

Add Leveraged Fund

1. Select an activity from the **Activity** dropdown above the outcomes and/or leveraged fund grid.
2. The outcomes and/or leveraged funds grids refresh to show all records currently associated with the selected activity.
3. Click on the **Add Leveraged Fund** button in the leveraged funds grid.
4. The grid expands for adding a leveraged fund record.
5. Enter all leveraged fund details.
6. Click the **Insert** button.
7. Leveraged fund details are saved.
8. Repeat Steps 2 – 7 for each leveraged fund you need to add for the activity selected.
9. Repeat Steps 1 – 8 for each activity in the activity dropdown until leveraged funds have been added for all applicable activities.

Edit Leveraged Fund

1. Click on the **Edit** icon next to an existing leveraged fund record in the grid.

2. The grid expands for editing the leveraged fund record.
3. Edit the leveraged fund details.
4. Click the **Update** button.
5. Leveraged fund details are updated.

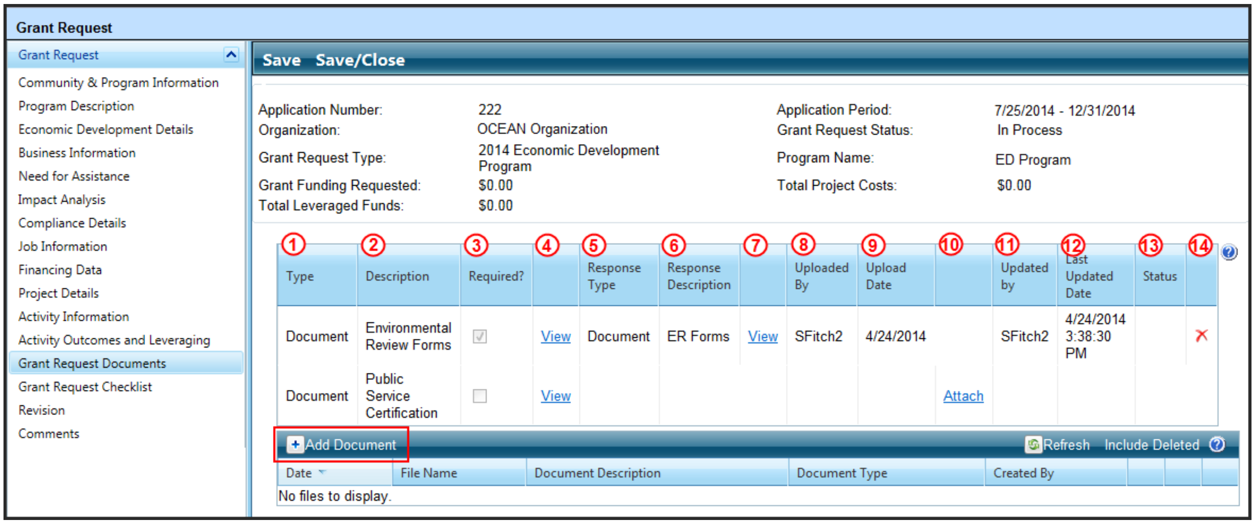
Cancel Adding/Editing Leveraged Fund

1. Click to either **Add Leveraged Fund** or **Edit** an existing leveraged fund record in the grid.
2. The grid expands for adding/editing a leveraged fund record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Leveraged Fund

1. Click on the **Delete** icon next to a leveraged fund record in the grid.
2. Leveraged fund record is deleted from the grid.

Grant Request Documents



Field	Description
1. Type	Displays the type of documentation. For grant request Documents, this will always display document.
2. Description	Displays the name of the template and/or instruction form document uploaded by OCD for your use in completing the application attachments.
3. Required	If this checkbox is checked, then the document requires a response (attachment) to be uploaded prior to submitting your application request. If this box is not checked, then no document is required. Even if it is not required, there may be special circumstances or conditions within your application details that make it necessary for you to attach a response. Therefore, you should always review each document and determine if they are required for your application or not.
4. View	Use this link to view/download templates and/or instruction forms for application documents.
5. Response Type	Displays the type of response document. For grant request documents, this will always display document.
6. Response Description	Displays the description that you enter when uploading your response document.
7. View	Use this second link to view/download your completed template or instruction form.
8. Uploaded By	Displays the username of the user who uploaded the response document.
9. Uploaded Date	Displays the date the response document was uploaded.
10. Attach	Use this link to upload your completed template and/or form for the application document listed.
11. Updated By	Displays the username of the user who last updated the response document.
12. Last Updated Date	Displays the date the response document was last updated.

13. Status	This field is not currently being used for the CHIP application request.
14. Delete	Click this icon to delete your response document.

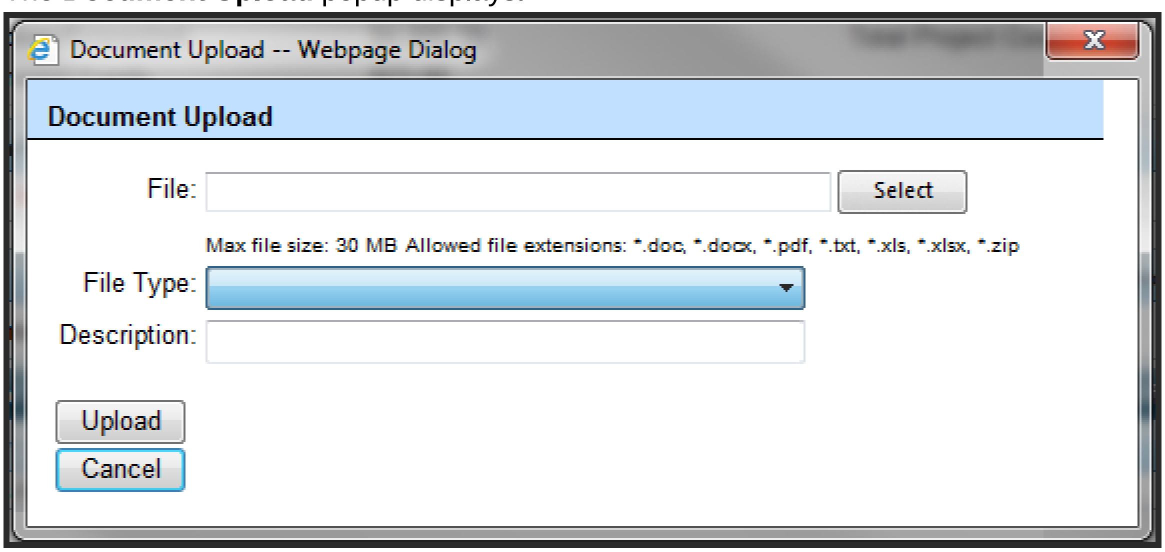
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

View Document in Grant Request Documents

1. Click the **View** link next to the provided template and/or instruction form or next to your response document.
2. A new window displays with the document details displayed.
3. Click the **File → Save As** menu option to save a copy of the document to your computer or close the window to return to the grant request documents page.

Attach Document in Grant Request Documents

1. Click the **Attach** link next to a record in the grant request documents grid.
2. The **Document Upload** popup displays.



3. Click the **Select** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **File Type** from the dropdown list (only option available will be ‘document’).
8. Enter a **Description** for your document.
9. Click the **Upload** button to attach your document to the record in the grant requests documents grid.

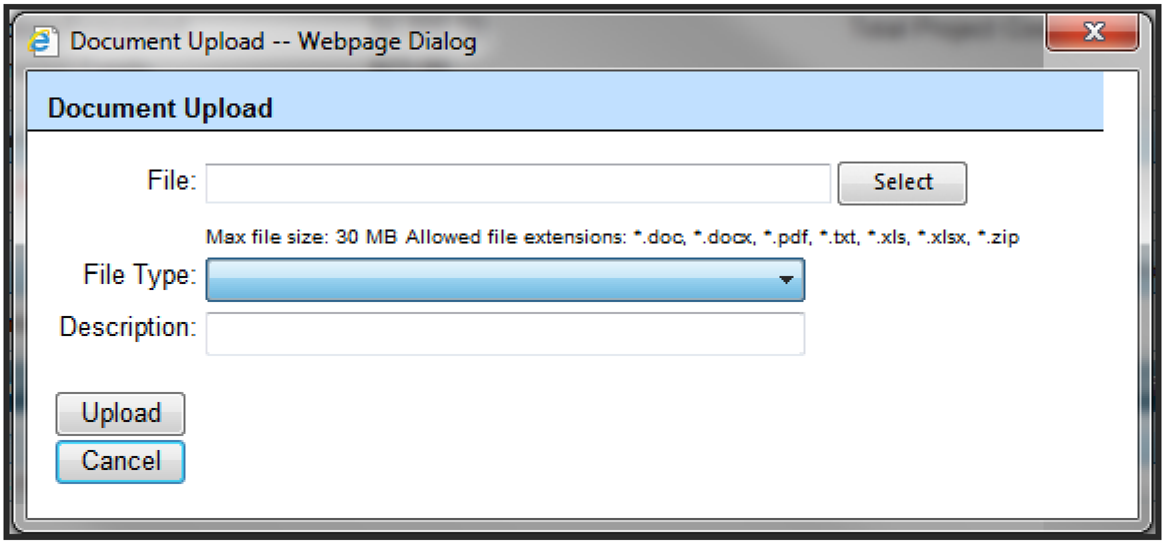
Delete Document from Grant Request Documents

1. Click the **Delete** icon next to a document in the grant request documents grid.

2. Your response document will be deleted.

Add Document

1. Click the **Add Document** button in the documents grid to attach a file that is not listed in the grant request documents grid.
2. The **Document Upload** popup displays.



3. Click the **Select** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **File Type** from the dropdown list (only option available will be ‘document’).
8. Enter a **Description** for your document.
9. Click the **Upload** button to upload your document to the documents grid.

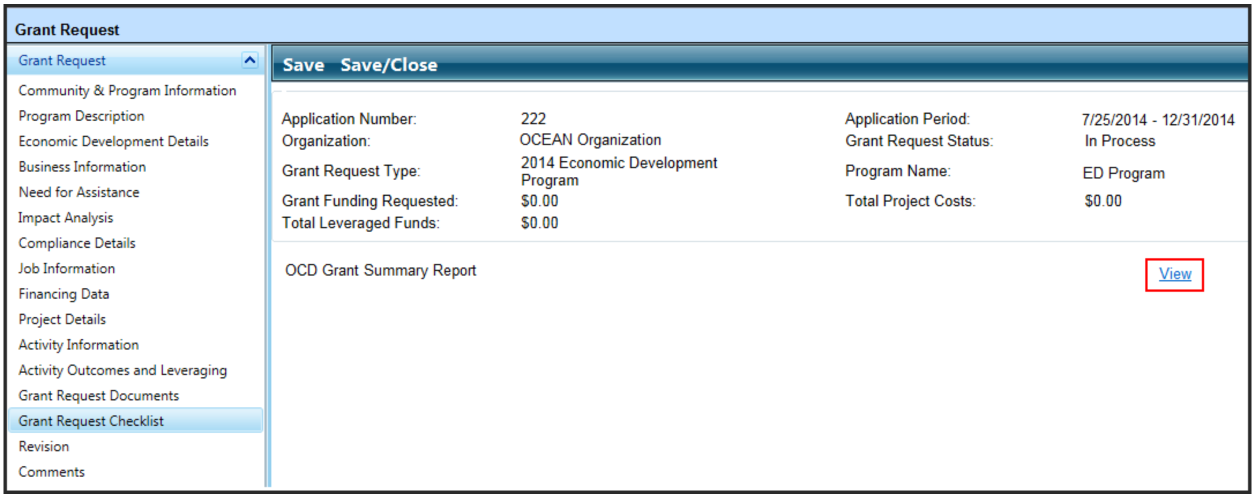
View Document

1. Click the **View** link next to the uploaded document in the documents grid.
2. A new window displays with the document details displayed.
3. Click the **File → Save As** menu option to save a copy of the document to your computer or close the window to return to the grant request documents page.

Delete Document

1. Click the **Delete** icon next to a document in the documents grid.
2. Your attached document will be deleted.

Grant Request Checklist

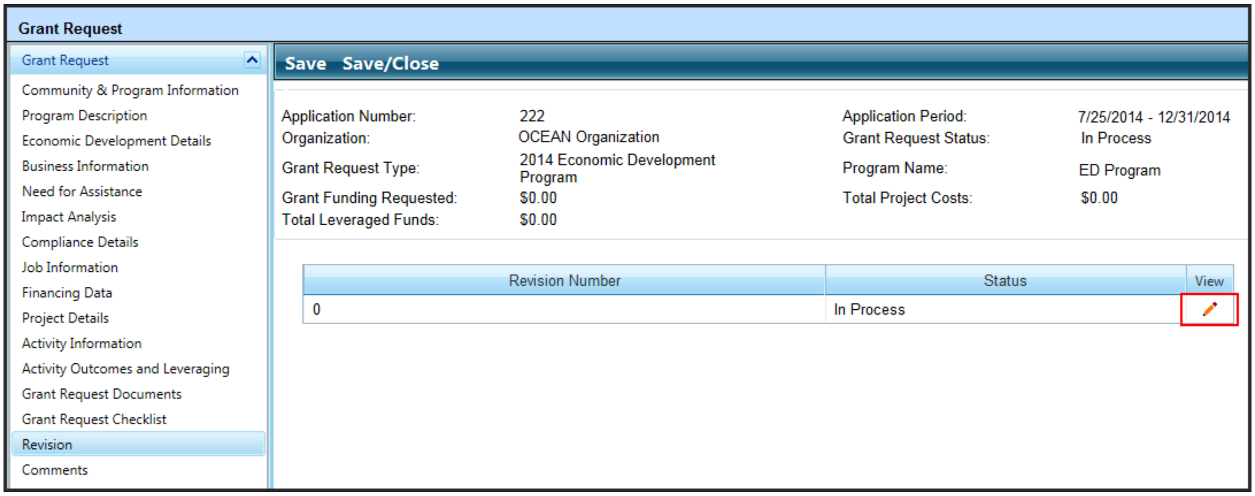


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

View

1. Click the **View** link next to the report listed on the grant request checklist page.
2. A new window displays with the report displayed.
3. Use the **Save** and **Print** icons in the window to save and/or print a copy of the report for your records.

Revision

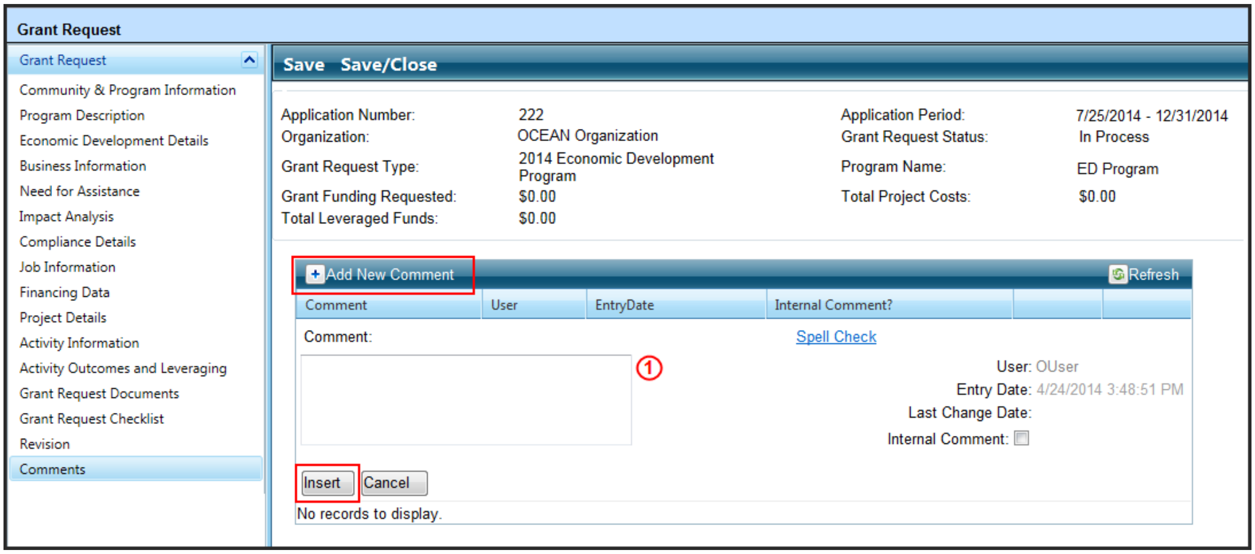


The functions available from the Revision page are listed below with steps for performing each function:

View Revision

1. Click the **View** icon next to the revision number in the grid.
2. A new window displays with the details of the revision number selected. *Note: All previous revisions will be non-editable, but data submitted in previous revisions will be available for viewing.
3. Close the window to return to the application request.

Comments



Field	Description
1. Comment	Enter a comment in the comment field. These comments will be retained with the application request along with your username, entry date, and date of any changes you made to your comments.

The functions available from the Comments page are listed below with steps for performing each function:

Add Comment

1. Click on the **Add New Comment** button in the grid.
2. The grid expands for adding a comment record.
3. Enter comment details.
4. Click the **Insert** button.
5. Comment details are saved.

Edit Comment

1. Click on the **Edit** icon next to a comment that you created. *Note: Comments can only be edited by the user who created them.
2. The grid expands for editing the comment record.
3. Edit the comment details.
4. Click the **Update** button.
5. Comment details are updated.

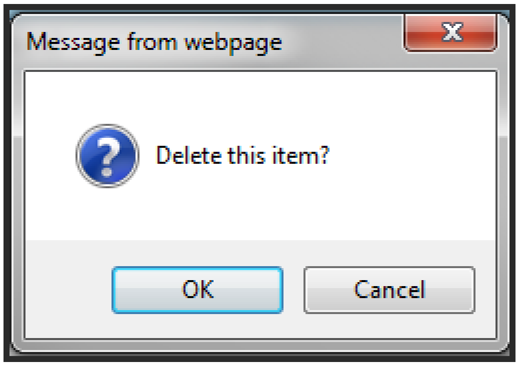
Cancel Adding/Editing Comment

1. Click to either **Add New Comment** or **Edit** an existing comment record in the grid.
2. The grid expands for adding/editing a comment record.

3. Click the **Cancel** button.
4. Changes are not saved.

Delete Comment

1. Click on the **Delete** icon next to an existing comment record in the grid. *Note: Comments can only be deleted by the user who created them.
2. A message will display asking if you are sure you want to delete this item.



3. Click **OK**.
4. Comment record is deleted from the grid.